

Workload Management

Workload Management

The Productive Leader
Releasing time to lead™





Workload Management: introduction

This module is typically delivered as a facilitated session to focus on the issues you face in managing your workload and the impact this has on your productivity.

While the Email Management and Meetings Management modules focus on the introduction of a specific model and the subsequent application of the model, this facilitated session is based around the analysis of your baseline data and what it demonstrates about your opportunities for improvement. You will also be taken through an analysis exercise and challenged to consider how much time you actually spend in meetings.

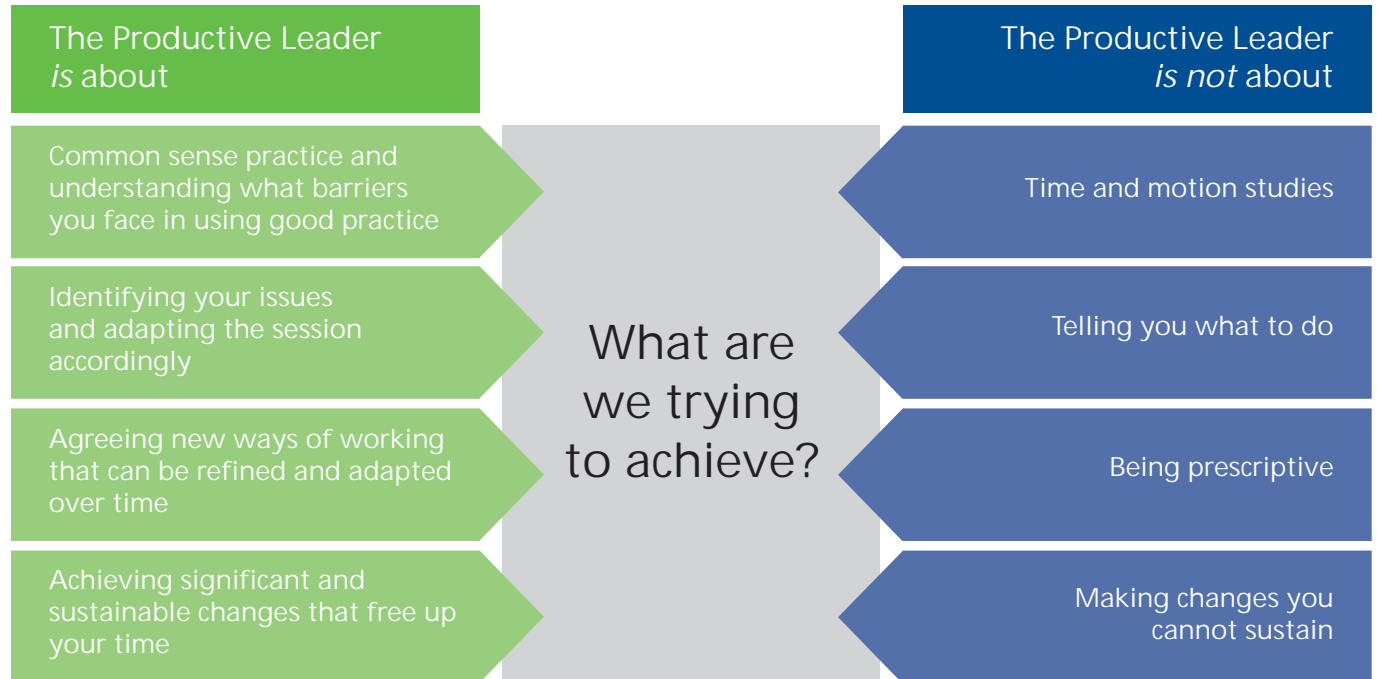
You will be introduced to the workload support tools, a set of tools specifically designed to help you manage your workload and your work environment.

The session concludes with you making personal and team commitments aimed at improving your workload management practices and your performance.

Purpose and context

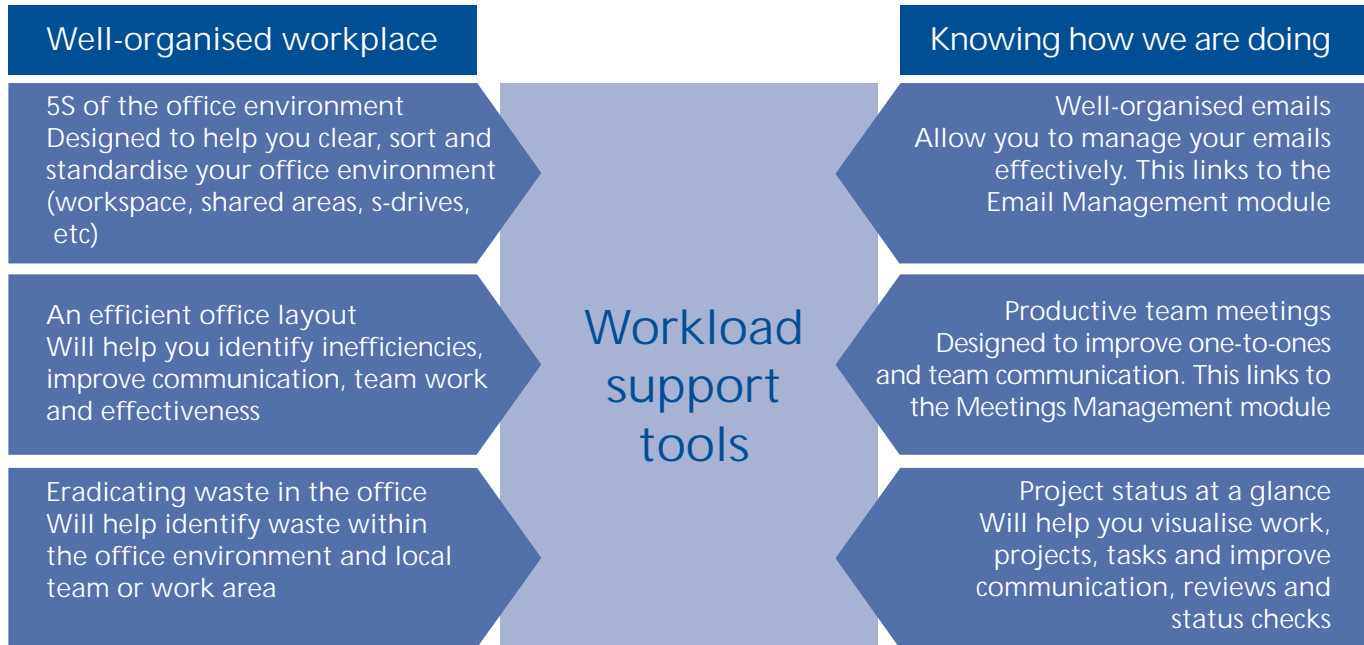


What is The Productive Leader trying to achieve?



Introducing the workload support tools

The six support tools are designed to help you manage your workload. At the end of this module, you will be guided to select the relevant tools.



What issues do you face with workload management?

Your notes:



How are you currently performing?

- The impact of inefficient workload management
- Benefits of managing your workload more effectively



NHS leaders do not typically follow best practice

Research undertaken within the NHS as part of the development of this programme found that:

- a typical working day is structured around meetings, with other things fitted around as time allows
- many leaders have an open door policy so their team can raise issues and risks as they arise - however PAs feel this can distract the leader from the job in hand
- many processes are reactive and respond to issues rather than planned in advance (eg project management)
- many processes grow organically without addressing their purpose or effectiveness (eg performance reviews, team meetings and one-to-ones)
- decision making is often reactive and sometimes involves the wrong people.

Most leaders know the basics of how to manage their workload effectively, but few follow them. In this respect, NHS leaders are no different from leaders in any other sector.

The benefits of managing your workload more effectively

- Achieve your objectives during the day.
- Deal more effectively with urgent issues as they arise.
- Ensure that the work you undertake is in line with your key responsibilities and goals.
- Have a standardised approach to diary management, which is clearly understood by all.
- Have a clearly communicated system of working practices agreed and understood by all.
- Have the confidence to delegate work because you have a system for following up actions.
- Allow you to work in an environment that is conducive to productivity and reduced stress.

Your typical working day



As a leader: if I had more time...

During the research phase of The Productive Leader, many leaders have said if they could save time they would spend more time:

- walking around sites, meeting staff and understanding current issues
- understanding and implementing emerging NHS strategy in a systematic way
- reflecting and organisational planning
- supporting and mentoring staff
- communicating with their support team.

As a PA: if I had more time...

During the research phase of The Productive Leader, many PAs have said that if they could save time they would reinvest it in:

- planning meetings with their leader
- undertaking project work to support their leader/department
- their personal development
- a better work-life balance.

In your leader and PA team, think about what you would both like to do if you had more time.

What does your workload data say?



Why is workload data so important?

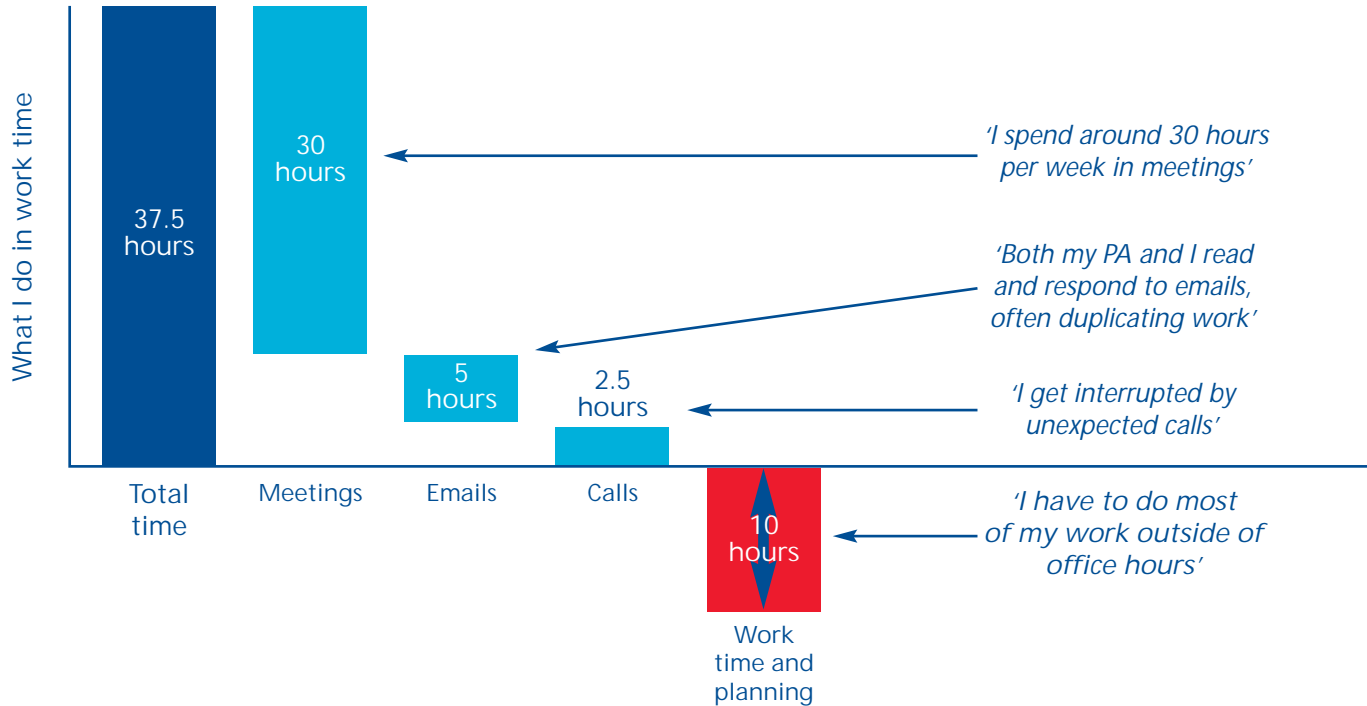
Data allows you to determine:

- what you actually spend your time doing
- your main activities during this time
- how much time you allocate to current priorities or mandatory work
- work that helps you achieve organisational/personal objectives
- what are your opportunities to make changes and save time.

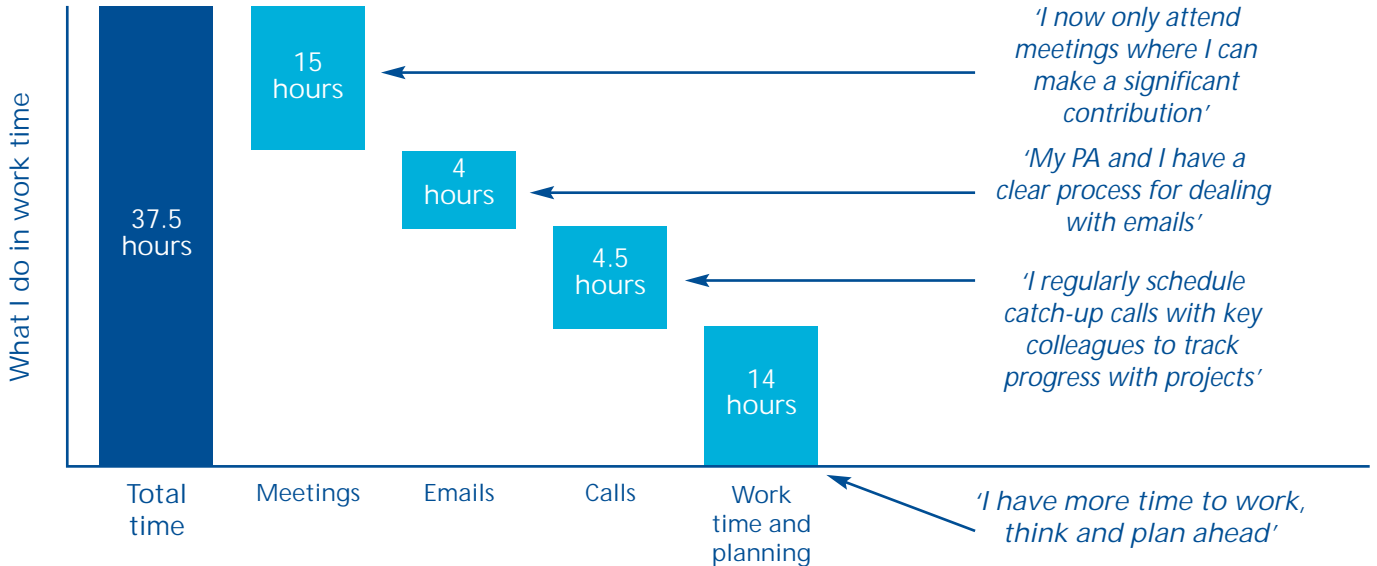
Data removes emotion and assumption and allows you to see the real picture.



An example of a leader's typical working week



The Productive Leader opportunities



Focus on meetings

- Break down meetings into categories
- Make a meetings matrix



What meetings do you attend?

Work together as a pair:

- write the names of every meeting on individual sticky notes
- on the left bottom corner, write the frequency
- on the right bottom corner, write the length of meeting.



Break down your meetings into categories

- Take two pieces of flip chart paper.
- Decide which categories the leader's meetings fall into, for example:
 - mandatory meetings
 - one-to-one or catch-up meetings
 - leadership meetings
 - external meetings.
- Write these along the top edge of the flip chart paper.
- Place your sticky notes under the correct heading and frequency.

Make you own list and headings for your role, area, working life. See the next page for an example.

Create a meetings matrix

		Importance / priority						
		High					Low	
		Board	Exec	Operational	EA/PA	Requested	Other	
Frequency	Low	Yearly	Mandatory	→				Optional
	Quarterly							
	Monthly							
	Weekly							
	High							

Note: Make you own list and headings for your role, area, working life

What does this tell you?
 Are you surprised at the number of meetings?

Example of a matrix from a test site



The value of reviewing activity data

'Taking time to reflect on my personal time-keeping, diary scheduling and priorities allowed me to overhaul my way of working.'

'As a team I thought my PA and I were very effective but diaries, email and routine were dictating our priorities, not the other way around. The Productive Leader allowed a good 'sort and sift' for us to lead by example with lean methodologies. By rationalising my diary I have more time to plan and more time to get out visiting wards and services to better understand their issues and how I can provide support.'

Chris Burke, chief executive, Stockport NHS Foundation Trust

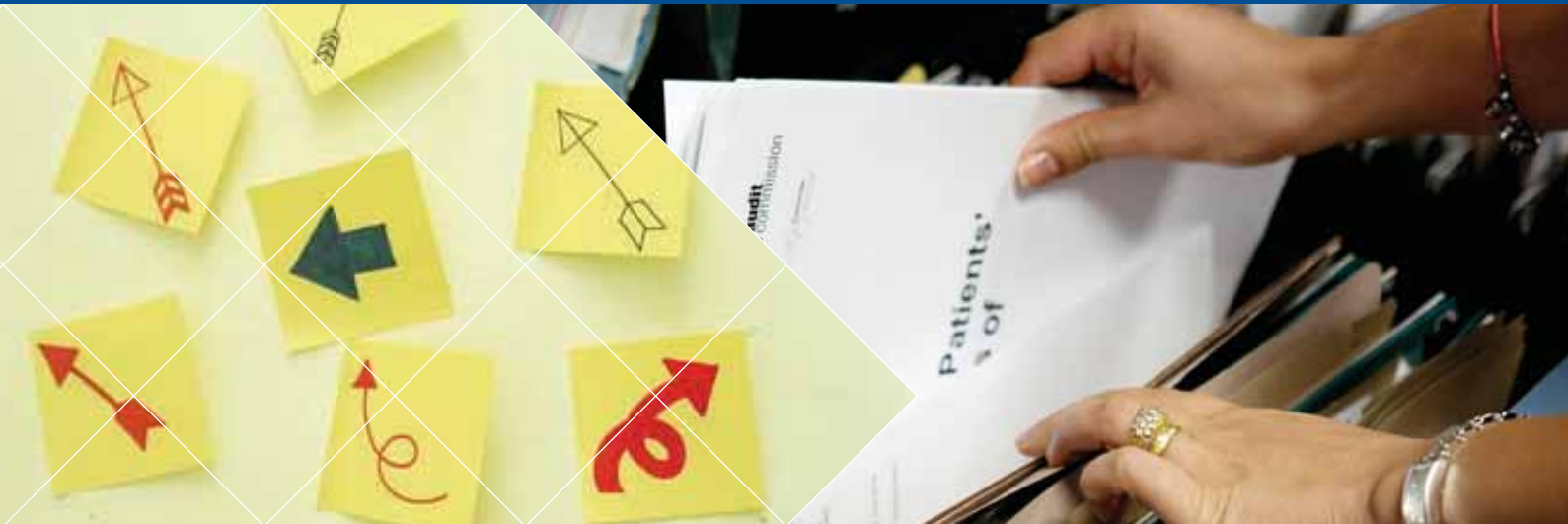


Your opportunities to change

As a leader and PA team – look at the matrix again. Can you:

- eliminate some of the meetings
- reduce the frequency of some of the meetings
- reduce the length of some of the meetings
- hold the meeting in a different way (telephone, conference call, WebEx etc. See the Meetings Management module for more details)
- delegate attendance to a member of your team.

Deciding where to start



Which of the workload support tools might help you?

As a leader and PA team look through the Workload Support tools document and:

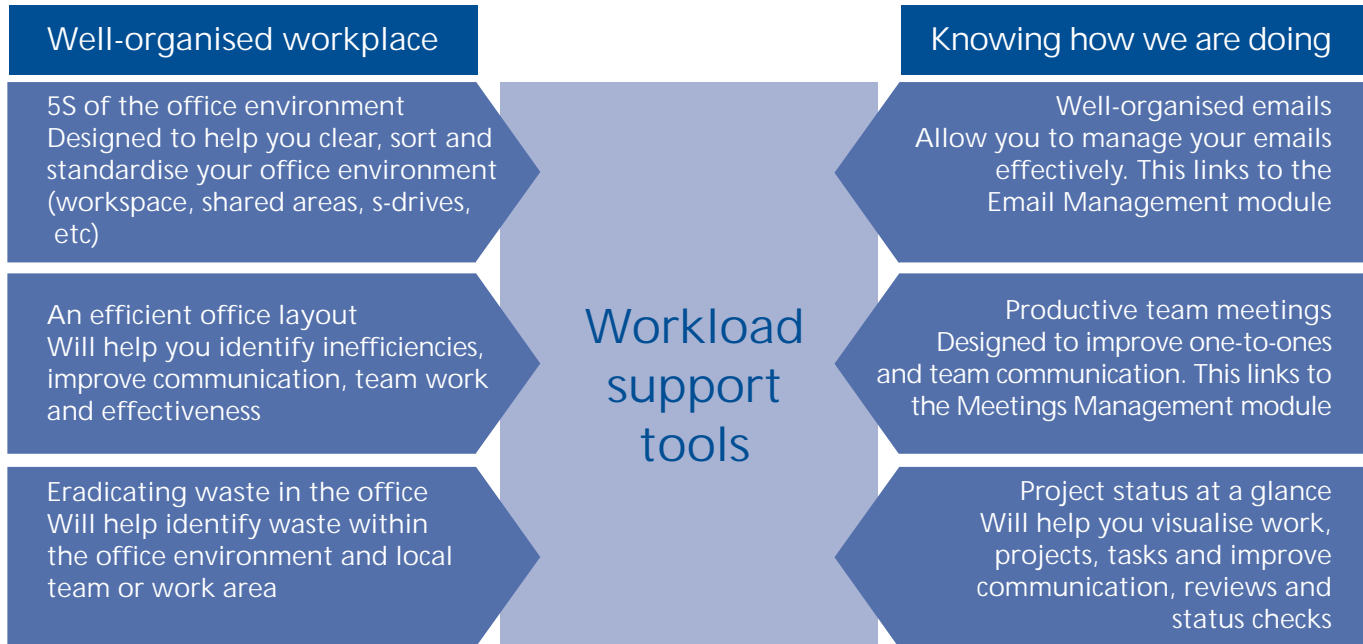
- think back to your baseline data
- what discussions have you had during this session about how you manage your individual and leader and PA team workload?
- what would make the biggest difference?

Take five minutes to discuss this. The next page gives an overview of the workload support tools. Agree your next actions when you leave this session.



The workload support tools

A powerful set of change principles that will help you improve your workload management and balance the demand on your time with your capacity.



Example of a workload management team improvement plan

Aim

To reduce the length of time spent in meetings by either reducing the length of meetings or their frequency

For each team member to achieve one of their objectives – ‘if I had more time... I would...’

Each leader and PA team to agree a method for managing emails

Each leader and PA team to agree which workload management support tools they will implement

Measurement

Reduction in the amount of time spent in meetings

Report to executive team meeting that this has been achieved

Confirmation from each team that this has been done

Confirmation to executive team meeting that the appropriate tool has been selected

You will find further useful workload management tools in the Workload Support Tools document.
Available as part of The Productive Leader box set or online at www.institute.nhs.uk/productiveleader

