Supervising Others

Training Manual

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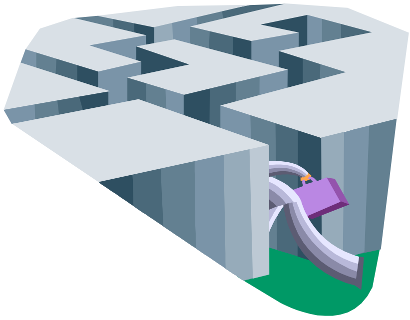
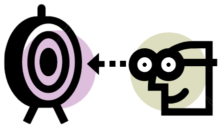
> *Good management consists in showing average people how to do the work of superior people.*
>
> *John D. Rockefeller*

Module One: Getting Started



Welcome to the Supervising Others workshop. Supervising others can be a tough job. Between managing your own time and projects, helping your team members solve problems and complete tasks, and helping other supervisors, your day can fill up before you know it. This workshop will help supervisors become more efficient. They will also become more proficient with delegating, managing time, setting goals and expectations (for themselves and others), providing feedback, resolving conflict, and administering discipline.

Workshop Objectives



Research has consistently demonstrated that when clear goals are associated with learning, the learning occurs more easily and rapidly. With that in mind, let's review our goals for today.

By the end of this workshop, you should be able to:

- Define requirements for particular tasks
- Set expectations for your staff
- Set SMART goals for yourself
- Help your staff set SMART goals
- Assign work and delegate appropriately
- Provide effective, appropriate feedback to your staff
- Manage your time more efficiently
- Help your team resolve conflicts
- Understand how to manage effectively in particular situations
- Understand what a new supervisor needs to do to get started on the right path

Pre-Assignment Review

The purpose of the Pre-Assignment is to get participants thinking about the supervisory tools that they are already using and where they need to improve. We asked participants:

- What supervisory aspects does your current role include?
- What supervisory tasks would you like to be performing?
- What supervisory strengths do you have?
- What are your supervisory weaknesses?
- Please list three things that you would like to get out of this workshop.

Take time now to review this assignment, particularly what you want out of the workshop.

> *Management is nothing more than motivating other people.*
>
> *Lee Iacocca*

Module Two: Setting Expectations

First things first: your employees need to know what you expect of them in order to succeed. In this module, we will work through the four steps of setting expectations.

1. Define the requirements.
2. Identify opportunities for improvement and growth.
3. Discuss the requirements.
4. Put it all in writing.

Defining the Requirements

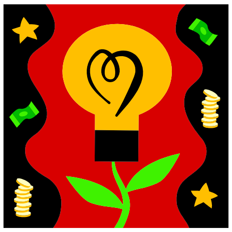
The first step is to define the requirements for the chosen task. In other words, what will success look like? You will want to develop your own set of criteria first, and then review it with the employee to get their valuable ideas and input.

Here are some questions to help you get started, focused around the five W's and the H.

- How does the task tie into organizational goals?
- Why are we doing this task?
- What are the key parts to the task?
- What steps will be involved?
- What should the end result look like?
- Who will the employee need to talk to?
- When should the employee report back?

This framework can be used for individual tasks, projects, and even expectations about the position itself.

Identifying Opportunities for Improvement and Growth



The best expectations are those that encourage the employee to grow and stretch. So, when setting expectations, you should explore all the possibilities and share them with your staff members.

Here is an example. Let's say you have some training tasks that you would love to delegate, but you're worried that the task would overwhelm anyone on your team. After all, many people aren't comfortable speaking in public.

However, during your expectations meeting, one of your senior staff members mentions that she is interested in learning more about training. This is the perfect opportunity to reduce your workload and to help your employee develop her skills, not to mention increase her job satisfaction. Everyone wins!

Likewise, your employee may have hopes and dreams but may be unwilling to share them for fear of being rejected, or for fear that they can't meet their own expectations. Your leadership and encouragement is essential to help your employees grow and develop. Encourage employees to try new things and provide them with the support they need. An action plan that gradually increases tasks and responsibilities is one way to do this.

Setting Verbal Expectations

Expectations can be verbal or written, depending on the situation. For informal expectation-setting meetings, such as a new, simple task, verbal expectations can suffice. To make sure you've covered all the bases, use the 5 W's and the H during your discussion.

- Who?
- What?
- When?
- Where?
- Why?
- How?

Putting Expectations in Writing

It's never a bad idea to write down your expectations. This document can be kept for your records, and it can be shared with the employee so they have something to refer to. You can use the following template for written expectations.

Employee Name:
Expectation Statement:
Date:
What are the key parts to the task?
What steps will be involved?
What should the end result look like?
Who will the employee need to talk to?
When should the employee report back?

> *Setting goals is the first step in turning the invisible into the visible.*
>
> *Anthony Robbins*

Module Three: Setting Goals

Goal setting is the single most important life skill that, unfortunately, most people never learn how to do properly. Goal setting can be used in every single area of your life, including financial, physical, personal development, relationships, or spiritual growth. According to Brian Tracy's book Goals, fewer than 3% of people have clear, written goals, and a plan for getting there. Setting goals puts you ahead of the pack!

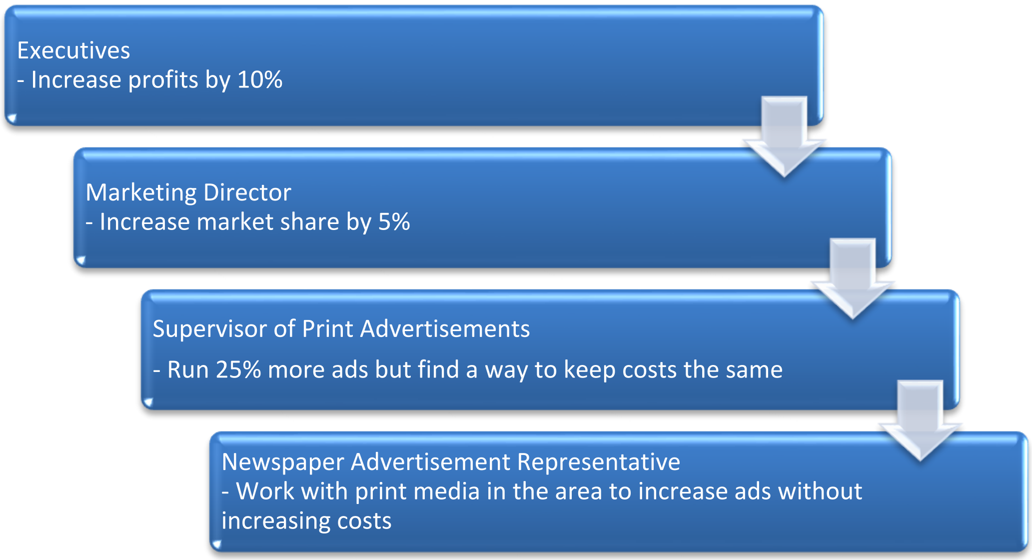
Some people blame everything that goes wrong in their life on something or someone else. They take the role of a victim and they give all their power and control away. Successful people instead dedicate themselves towards taking responsibility for their lives, no matter what unforeseen or uncontrollable events occur. Live in the present: the past cannot be changed, and the future is the direct result of what you do right now!

Understanding Cascading Goals

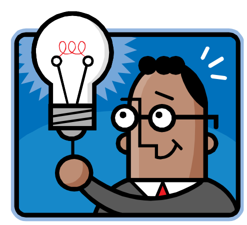
Some of the most successful organizations use the cascading, or waterfall, goal setting method. This means that the executives set their goals first, and then those goals flow down through the organization. This ensures that everyone is on the same page and working for the same thing.

Here is an example where the executives have set a goal to increase profits by 10%. The Marketing Director is one person that reports directly to the executives. They have determined that they can contribute to this goal by increasing the company's share of the market by 5%. The other members of their department then work with their supervisors to determine how they can contribute to this. (They will likely have other goals, too, but this would be their primary focus.)

This is a very short excerpt of the company's waterfall goals. The goals themselves will require more fleshing out, but we'll get to that in the next topic.



The SMART Way



SMART is a convenient acronym for the set of criteria that a goal must have in order for it to be realized by the goal achiever.

- **Specific**: Success coach Jack Canfield states in his book The Success Principles that, "Vague goals produce vague results." In order for someone to achieve a goal, they must be very clear on what they want. Often, creating a list of benefits from the accomplishment of the goal will give them a compelling reason to pursue that goal.

- **Measurable**: It's crucial for goal achievement that goal setters are able to track their progress towards the goal. That's why all goals need some form of objective measuring system so that they can stay on track and become motivated. It will also help you as the supervisor evaluate their progress.

- **Achievable**: Setting big goals is great, but setting unrealistic goals will just de-motivate you. A good goal is one that challenges, but is not so unrealistic that the person has virtually no chance of accomplishing it.

- **Relevant**: Before you even set goals, it's a good idea to sit down and define your core values and your life and career purposes. These tools will help the person set goals that matter to them.

- **Timed**: Without setting deadlines for goals, the goal setter will have no real compelling reason or motivation to start working on them. By setting a deadline, your subconscious mind begins to work on that goal, night and day, to bring you closer to achievement.

The Three P's

Setting meaningful, long-term goals is a giant step toward achieving your dreams. In turn, setting and achieving short-term goals can help you accomplish the tasks you'll need to achieve the long-term ones. It is also important to make sure that all of your goals unleash the power of the three P's:

- **POSITIVE**: Who could get fired up about a goal such as "Find a career that's not boring"? Goals should be phrased positively, so they help you feel good about yourself and what you're trying to accomplish. A better alternative might be this: "Enroll in pre-law classes so I can help people with legal problems someday."

- **PERSONAL**: Goals must be personal. They must reflect your own dreams and values, not those of friends, family, or the media. When crafting your goal statement, always use the word "I" in the sentence to brand it as your own. When your goals are personal, you'll be more motivated to succeed and take greater pride in your accomplishments.

- **POSSIBLE**: When setting goals, be sure to consider what's possible and within your control. Getting into an Ivy League university may be possible if you are earning good grades but unrealistic if you're struggling. In the latter case, a more reasonable goal might be to attend a university or trade school that offers courses related to your chosen career. You might also pursue volunteer work that would strengthen your college applications.

Helping Others Set Goals

Before you help others set goals, you should set your own goals using the guidelines described above. Your primary focus should be goals that are in line with the organization, in the waterfall form described previously. Then, you will want to set a few personal development goals and a few department-specific goals.

Once you have established your goals, you should have a meeting with each employee and help them set their goals. It is a good idea to ask them to come to the meeting prepared with some ideas of organizational, departmental, and personal goals that they would like to achieve. You should also be prepared with some goals that you would like to see employees work on.

In the meeting, ask the employee to write down the final goals decided on. (These should follow the SMART PPP format discussed previously.) Then, they can add action steps for each goal. Once they finalize the document, they should send a copy to you.

Here is a template that you can use.

NAME:			
DATE:			
CIRCLE THE AREA OF THE GOAL.	**DEPARTMENTAL**	**ORGANIZATIONAL**	**PERSONAL**
GOAL #1:			
SPECIFIC?		**PERSONAL?**	
MEASURABLE?			
ACHIEVABLE?		**POSSIBLE?**	
RELEVANT?			
TIMED?		**POSITIVE?**	
NEXT STEP			
START DATE			
DUE DATE			

After goals have been set, they should be reviewed on a regular basis. The appropriate timeframe depends on the goal. We recommend reviewing each goal on a quarterly or semi-annually basis, and then creating new goals annually.

It is extremely important that the goals that you help employees set are designed for them, not for you. This will keep them motivated and help them achieve their goal.

> *Endeavors succeed or fail because of the people involved. Only by attracting the best people will you accomplish great deeds.*
>
> *Colin Powell*

Module Four: Assigning Work

Just as important as what tasks you assign to individuals is how you assign them. Allowing employees to have a say in what tasks they perform and how they perform them can increase job satisfaction and performance exponentially. However, there are often situations where tasks need to be assigned quickly, or you may require menial tasks that no one really wants to do, to be completed. This module will give you several ways to assign work and explore which method is appropriate in which situation.

General Principles

When assigning any sort of work, keep the 5 W's and the H in mind, just as we did when setting expectations. In particular, you will want to explain what the task is, when it is due, and when they should provide progress reports. Although it is often best to give employees as much freedom as possible in executing the task, you will want to explain what the end product should look like, particular steps that will need to be followed (especially when safety or interdependence with other projects is involved), and resources that they can use.

Work assignments often fall into one of three categories:

- **ORDERS**: These leave no room for guesswork, and they typically match the dictatorial approach discussed below. These should only be used for emergencies. Example: "Shut off that tap, now!"
- **REQUESTS**: These types of assignments leave the employee some room for interpretation. These are the work descriptions you will want to use most often. Example: "John, please turn off that water."
- **SUGGESTIONS**: These types of work assignments leave the most room for interpretation and should only be used if you don't care how the work gets done, or if it's a low priority task. Example: "Susan, it would be nice if we could come up with a different format for that report."

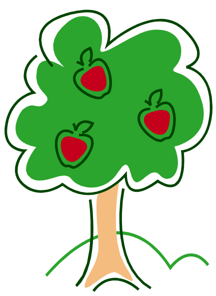
The Dictatorial Approach

The easiest short-term work assignment method is to simply assign tasks to individuals. However, this generates the least job satisfaction and independence.

This method should be used when a task needs to be completed urgently, or if it is a task that no one wants to take on.

For best results, make sure that you explain the importance of the task and the rewards to the individual, the department, and the organization.

The Apple-Picking Approach



This method gives employees more freedom in choosing their tasks, although it does not emphasize team problem solving or collaboration. The basic idea is that the team member chooses a project that they would like to work on from a list of departmental tasks.

This is a good method to use when there is a small group of tasks to be assigned, a very small group of employees, and not enough time for a meeting. In this case, make sure that the tasks are equal in value and workload. This method can also be used when the department has a list of low-priority "fillers" and an employee needs a short term project.

Be careful when using this method if there are just as many tasks as people, as employees' choices will be reduced as you move through the team members.

The Collaborative Approach

With this method, the team has a meeting to decide who completes which task. The list of tasks is posted on flip chart or whiteboard. For maximum effectiveness, all team members help establish objectives and deadlines for each tasks.

This is the most effective method because giving team members a say in the way the work is distributed, and giving them the opportunity to choose more meaningful tasks, will enable you to get more out of your employees and to help them grow and develop.

However, this method is not appropriate for a list of menial tasks, or if a task needs to be urgently completed. It is most effective when used with a mature team (a team that has worked together for six months or more).

The great leaders are like the best conductors: they reach beyond the notes to reach the magic in the players.

Blaine Lee

Module Five: Degrees of Delegation

Many supervisors feel that by giving tasks to others, they're giving their power away. This simply isn't true! Delegation is one of the most valuable skills you will ever learn. By delegating the tasks that you don't really need to do, you free up time for those high-reward projects.

Even better, delegating doesn't have to be all or nothing. In this module, we will learn about the degrees of delegation and when to use each of them.

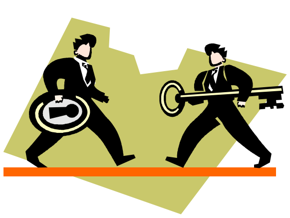
Level One: Complete Supervision

The first level of delegation is complete supervision. This gives the employee the least independence, but it gives you the most control.

Although this level of delegation should not be used often, it can be used in situations such as these:

- The task is dangerous and the employee is not familiar with it.
- The task has important organizational, financial, or legal implications. For example, if an employee is preparing a year-end report for the first time, you will probably want to supervise the process and carefully examine the results.

Level Two: Partial Supervision



The second level of delegation is a good balance between employee freedom and manager supervision. With this level, the employee does the task on their own, but the supervisor monitors the work, evaluates progress, and keeps a close eye on how things are moving along.

This is the most commonly used level of delegation, and is the one that you will use for most tasks. However, to maximize your delegating potential, try to encourage employees to grow and develop by adding more levels of complexity as they become more comfortable with the task.

For example, let's say that you have been delegating the weekly team status report to the team's most senior person. After the report is submitted, you type the report using your organization's template. Once the delegate has become comfortable with creating the report, the next step could be to use the template themselves, cutting out one step for you, and moving them further along the journey to independence.

Level Three: Complete Independence

The last level of delegation is the one that we should hope to move towards for most tasks. Here, the employee does the task completely on their own.

However, spot-checks and progress updates are important. Continuing with the example of the progress report, let's say that the final step is to post the report on the departmental Intranet. The delegate may want to CC you when they post the report so that you can read it, and so that you know it has been submitted.

Think very carefully when choosing a level of delegation. Too low, and the employee may feel distrusted and smothered. Too high, and you may find a disaster on your hands.

Never tell people how to do things. Tell them what to do and they will surprise you with their ingenuity.

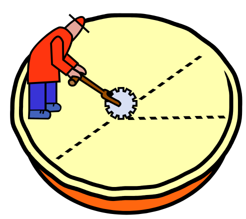
General George S. Patton

Module Six: Implementing Delegation

Now that we understand the different ways of delegating, let's look at the actual skills involved in delegating. At first sight, delegation can feel like more hassle than it's worth. However, by delegating effectively, you can hugely expand the amount of work that you can deliver. When you arrange the workload so that you are working on the tasks that have the highest priority, and other people are working on meaningful and challenging assignments, you have a recipe for success.

Deciding to Delegate

Delegation allows you to make the best use of your time and skills, and it helps other people in the team grow and develop to reach their full potential in the organization. Delegation is a win-win situation for all involved, but only when done correctly.



Keep these criteria in mind when deciding if a task should be delegated:

- The task should provide an opportunity for growth of another person's skills.
- Weigh the effort to properly train another person against how often the task will reoccur.
- Delegating certain critical tasks may jeopardize the success of your project.
- Management tasks, such as performance reviews, and tasks specifically assigned to you should not be delegated.

To Whom Should You Delegate?

Once you have decided to delegate a task, think about the possible candidates for accepting the task. Things to think about include:

- What experience, knowledge, skills, and attitude does the person already have?
- What training or assistance might they need?
- Do you have the time and resources to provide any training needed?
- What is the individual's preferred work style? Do they do well on their own or do they require more support and motivation? How independent are they?
- What does he or she want from his or her job?
- What are his or her long-term goals and interest, and how do these align with the work proposed?
- What is the current workload of this person? Does the person have time to take on more work?
- Will you delegating this task require reshuffling of other responsibilities and workloads?

When you first start to delegate to someone, you may notice that he or she takes longer than you do to complete tasks. This is because you are an expert in the field and the person that you have delegated to is still learning. Be patient: if you have chosen the right person to delegate to, and you are delegating correctly, you will find that he or she quickly becomes competent and reliable. Also, try to delegate to the lowest possible organizational level. The people who are closest to the work are best suited for the task because they have the most intimate knowledge of the detail of everyday work. This also increases workplace efficiency, and helps to develop people.

Providing Instructions

Now, once you have worked through the above steps, make sure you brief your team member appropriately. Take time to explain why they were chosen for the job, what's expected from them during the project, the goals you have for the project, all timelines and deadlines, and the resources on which they can draw. Let them know how much supervision they can expect from you.

Work together to develop a schedule for progress updates, milestones, and other key project points. After the meeting, ask the team member to give you a summary of the important points to make sure they have understood the task. If it is a large task, you may want to create a miniature project summary. This can be a valuable tool for the delegate when they are working on the task.

You will want to make sure that the team member knows that you want to know if any problems occur, and that you are available for questions or guidance needed as the work progresses.

Monitoring the Results

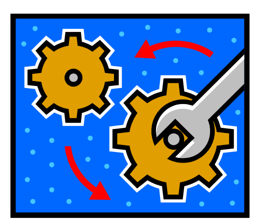
We all know that as managers, we shouldn't micro-manage. However, this doesn't mean we must abdicate control altogether. In delegating effectively, we have to find the difficult balance between giving enough space for people to use their abilities, while still monitoring and supporting closely enough to ensure that the job is done correctly and effectively. One way to encourage growth is to ask for recommended solutions when delegates come to you with a problem, and then help them explore those solutions and reach a decision.

It is important that you hold delegates to the original schedule that you agreed upon. Congratulate them on milestones accomplished and deadlines met. If deadlines are missed, explore why. These investigations often provide valuable lessons learned for both you and the employee. Don't be afraid to ask for progress reports. Remember, your job is to help the employee stay on track, and to remove any barriers that are impeding their task.

When delegated work is delivered back to you, make sure to set aside enough time to review it thoroughly. If possible, only accept good quality, fully complete work. If you accept work that you are not satisfied with, your team member does not learn to do the job properly.

Of course, when good work is returned to you, make sure to both recognize and reward the effort. As a leader, you should get in the practice of complimenting members of your team every time you are impressed by what they have done. This effort on your part will go a long way toward building team members' self-confidence and efficiency now and in the future.

Troubleshooting Delegation



Although delegation seems simple enough on paper, its application in real life can be much more difficult! Let's look at some of the most common delegation issues and how to solve them.

- **THE DELEGATE KEEPS COMING TO YOU WITH QUESTIONS.**
    - Although the delegate should feel comfortable coming to you and asking questions, there can come a point where they are relying on you too much.
    - One way to reduce the need for your time, and to increase their independence, is to show them where they can find the answers.

- Another approach is to ask them for recommendations when they have a problem. Then, help them explore the possibilities and choose a solution.

- It may also be possible that you have assigned a complicated task to someone who is not prepared for it. If this becomes the case, the best approach is usually to ask a senior person to assist the junior person with the task. (Once again, this helps develop employees and increases their independence.) Try to avoid re-assigning a task unless it's absolutely necessary.

- **YOU HEAR THAT ANOTHER TEAM MEMBER IS PERFORMING THE DELEGATED TASK.**

  - It's always best to get your information from the source. Talk to the delegate and find out who they are using as a resource and how much of that person's time is being used. If you feel that too much of that person's time is being used, suggest alternate resources.

  - You may also want to check with the person involved in the task to ensure they don't feel overwhelmed or taken advantage of.

  - In general, when you hear these kinds of rumors, keep a close eye on the situation, and react appropriately.

- **THE END RESULT IS NOT WHAT YOU EXPECTED.**

  - First, take a moment to evaluate the problem. Is it done incorrectly, or just not done the way you would have done it? (There really is a difference between the two!)

  - Explain to the delegate what is done incorrectly and how it can be resolved. Take time to find out why the delegate did the task the way they did. Were the original instructions incorrect? Were they unable to find help when they needed it? Did someone else tell them to do it differently? Take careful notes during this discussion. This can provide valuable lessons for you and the delegate.

Anticipate the difficult by managing the easy.

Lao Tzu

Module Seven: Providing Feedback

As a supervisor, you will work with all types of people in all types of situations. With this in mind, it only makes sense that there are many types of feedback that we can deliver. In turn, delivering the appropriate type of feedback increases the chance that the receiver will hear, understand, accept, and act on that feedback.

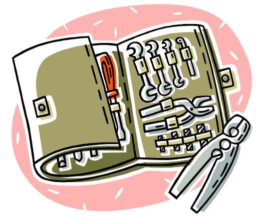
Characteristics of Good Feedback

In order for feedback to be well received and acted upon, four main characteristics should be present. Simply remember the STEBAH acronym:

- **Specific**: Be specific about what behavior you want the person to change.
- **Timely**: The feedback should be delivered as soon as possible for maximum effectiveness.
- **Expressed Directly**: The feedback should be delivered in a direct manner to the person whose behavior needs to change.
- **Behavior-Focused**: The feedback should focus on the behavior that should be changed, not the person, or their personality.
- **Actionable**: The feedback has to be about something the person can change. Complaining that their left-handedness is causing a slowdown on the assembly line is not productive, because it is not realistic to expect the individual to be ambidextrous.
- **Helpful**: Deliver the feedback in a manner that shows that you want to help the individual with this problem. Key attitudes include respectfulness, honesty, open-mindedness, and empathy.

Feedback Delivery Tools

DIRECT PRAISE OR CRITICISM



This is often used in informal feedback situations, but can also be used as part of formal feedback. Remember the characteristics of good feedback even when delivering these short items.

Some examples include:

- "That report that you sent out today looked great, Jamie."
- "You need to put your hard hat on, Aaron."
- "Thank you for helping Paul out with that task, Lisa."

Note that direct criticism, without any buffering (as described below), should be used very rarely – typically only when there is a safety issue (as in the hard hat example above).

THE FEEDBACK SANDWICH

The feedback sandwich is a constructive way of delivering negative feedback. You simply sandwich the negative between two positives.

Example: "Susan, your report had all the right statistics in it, and I really appreciate that. However, we need you to use the company template. I've e-mailed it to you so that you can use it the next time. Good job getting it in on time, too!"

This approach has been criticized because it trains the employee to always expect a negative when they hear a positive, and it takes the focus away from the actual problem. However, it is especially useful for new or sensitive employees or in situations where the job is well done overall.

THE OPEN-FACED SANDWICH

The open-faced sandwich is a modified version of the Feedback Sandwich described above. In it, you give the person some praise, give the feedback, and then give constructive help on modifying the behavior. This places more focus on the problem at hand, but still gives the employee something positive to focus on.

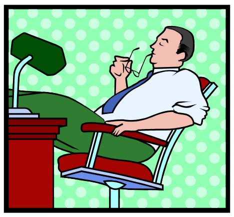
Example: "Susan, your report had all the right statistics in it, and I really appreciate that. However, we need you to use the company template. I've e-mailed it to you so that you can use it the next time."

ABOUT 360 DEGREE FEEDBACK

360 Degree Feedback is a tool that allows the employee to receive feedback from all the groups that they interact with, including customers, co-workers, supervisors, and people that report to them. It is a very intensive process, but when implemented properly, it can give people a real sense of their

strengths and weaknesses. Although 360 Degree Feedback is worth a course on its own, just remember that your team should be encouraged to deliver feedback to each other using some of the tools just discussed. This will improve communication and problem solving, and build team co-operation and maturity.

Informal Feedback



This is the type of feedback that you will deliver most often. This sort of feedback is quick, precise, and direct. It can be delivered in person, over the phone, or via e-mail. It can happen between co-workers, or between a supervisor and their staff.

When delivering this type of feedback, be sensitive to the message that you are sending and to the other people present. Criticizing a team member in front of the entire team will not be well received. Perhaps surprisingly, being praised in front of a group can make some people feel uncomfortable, too.

Formal Feedback

This type of feedback involves documentation and collaboration to identify areas of strengths and weaknesses, and to create action plans for addressing those areas. It is typically focused on the long term rather than the short term. Some examples include formal reviews, goal setting meetings, or reporting on the team's progress in a team meeting. Most often, formal feedback will be delivered from the supervisor to their staff member(s).

When setting up a meeting for formal feedback, remember the following tips.

- Give the employee lots of notice about the meeting.
- Be sensitive when asking them to meet with you. For some people, the phrase, "I'd like to see you in my office," produces an immediate phobic reaction. It's best to let them know privately and quietly.
- Let the employee know what the meeting is about and give them any necessary documents to prepare for the meeting. This will also help alleviate fear and anxiety.
- Make sure the meeting is at a convenient time for both you and the employee. Try to avoid scheduling meetings right before lunch or the end of the day so that neither of you feel rushed.

Time management is life management.

Robin Sharma

Module Eight: Managing Your Time

Supervisors often find that between helping their colleagues, managing their staff, and performing their own tasks, that there are not enough hours in the day. This module will give you some tools to plan and prioritize effectively and make the most of the time that you have.

The 80/20 Rule

The 80/20 rule, also known as Pareto's Principle, states that 80% of your results come from only 20% of your actions. Across the board, you will find that the 80/20 principle is pretty much right on with most things in your life. For most people, it really comes down to analyzing what you are spending your time on. Are you and your team focusing in on the 20% of activities that produce 80% of the results?

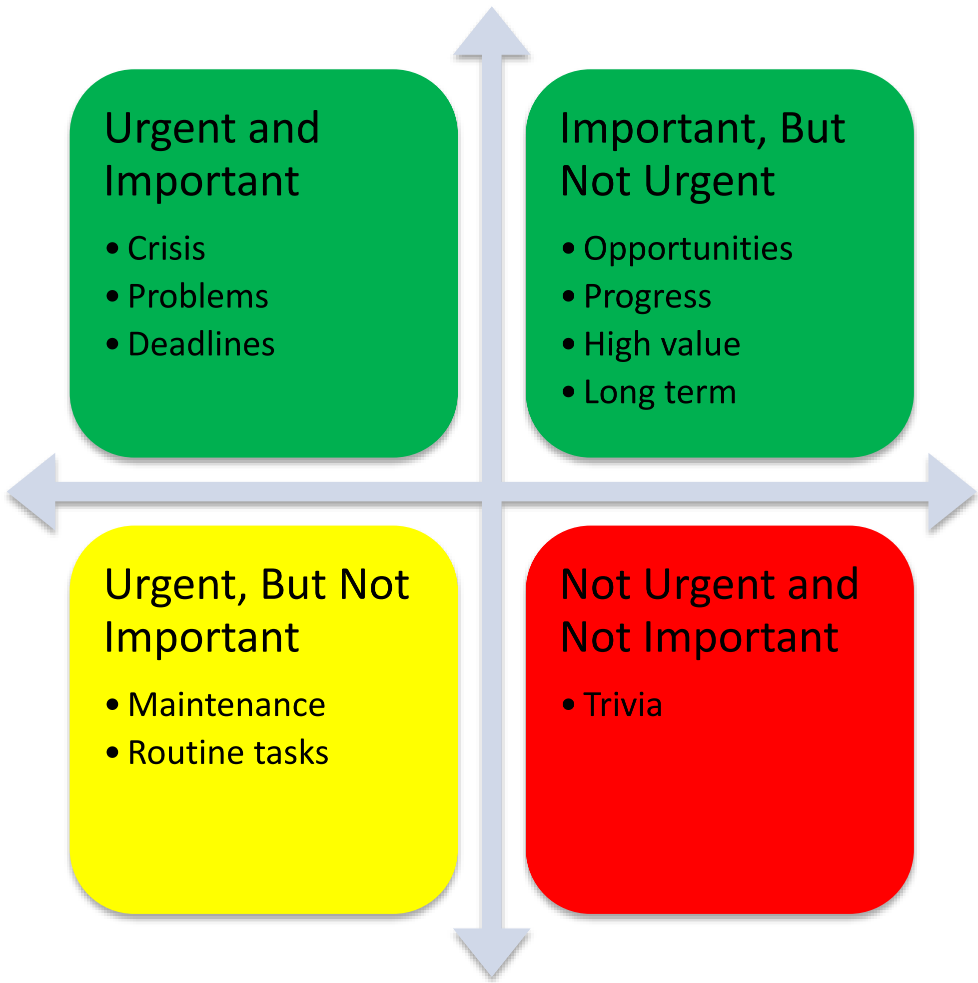
Prioritizing with the Urgent-Important Matrix

Great time management means being effective as well as efficient. Managing time effectively, and achieving the things that you want to achieve, means spending your time on things that are important and not just urgent. To do this, you need to distinguish clearly between what is urgent and what is important:

- **IMPORTANT**: These are activities that lead to achieving your goals and have the greatest impact on your life.
- **URGENT**: These activities demand immediate attention, but are often associated with someone else's goals rather than our own.

This concept, coined the Eisenhower Principle, is said to be how former US President Dwight Eisenhower organized his tasks. It was rediscovered and brought into the mainstream as the Urgent/Important Matrix by Stephen Covey in his 1994 business classic, The Seven Habits of Highly Effective People. The Urgent/Important Matrix is a powerful way of organizing tasks based on priorities.

Using it helps you overcome the natural tendency to focus on urgent activities, so that you can have time to focus on what's truly important. You can also share this knowledge with your staff, so that they too can focus on the most important activities.



DEBRIEF

- **URGENT AND IMPORTANT**: Activities in this area relate to dealing with critical issues as they arise and meeting significant commitments. *Perform these duties now.*
- **IMPORTANT, BUT NOT URGENT:** These success-oriented tasks are critical to achieving goals. *Plan to do these tasks next.*
- **URGENT, BUT NOT IMPORTANT:** These chores do not move you forward toward your own goals. Manage by delaying them, cutting them short and rejecting requests from others. *Postpone these chores.*

- **Not Urgent And Not Important:** These trivial interruptions are just a distraction, and should be avoided if possible. However, be careful not to mislabel things like time with family and recreational activities as not important. *Avoid these distractions altogether*.

Using a Productivity Journal

Prioritizing and planning are excellent activities that will increase your productivity exponentially. However, in order to be most effective your priorities and plans need to be written down. We recommend creating and using a Productivity Journal.

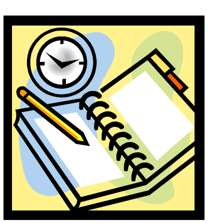
To start, get yourself a spiral notebook and label it as your Personal Productivity Journal or your Professional Productivity Journal. (We recommend keeping a separate journal for work and for your personal life, so you can focus on them at separate times, thus maintaining your optimal work/life balance.) Label each page with the day and the date and what needs to be done that particular day. For your professional journal, make sure to include what team member is involved in each task.

Next, prioritize each task in order of importance. Highlight the top three items and focus on those first. Cross off items as you complete them. Items that are not completed should be carried over to the next page.

A few tips for success:

- Take some time at the end of the day to start the next day's list. Then, in the morning, review the list and prioritize.
- Always have your productivity journal with you during the day to avoid becoming sidetracked. Crossing off completed tasks will give your subconscious mind a tremendous amount of satisfaction. This will also help to maintain your motivation to complete the remaining items on your action list.
- If you find yourself moving uncompleted tasks over into the following day, and the day after that, then you need to ask yourself why that task is on your list in the first place and what value it has in your life. If you postpone a task three times, it does not belong on your action list.

Using Routines and Rituals to Simplify Your Workday



Having a routine can help your workday go much smoother. By setting aside specific times for open-door meetings, e-mail, phone calls, and other routine tasks, you can complete a group of tasks at the same time. This will increase your efficiency and productivity, and avoid re-work.

Building a ritual for various tasks can also save you time during the day. You can build any type of ritual in three easy steps.

- **Identify the Task.** Let's say you want to build an exercise ritual.
- **Identify the Time and/or Trigger.** For example, perhaps you normally exercise right after work.
- **Identify the Sub-Tasks.** For you, perhaps your ritual involves going to the gym, getting changed, stretching, doing 45 minutes on the treadmill, performing three reps of weights, and doing a lap around the pool to finish things off. Then, you shower and go home.

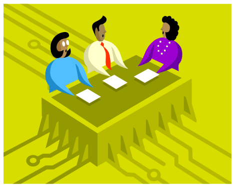
Seek first to understand, then to be understood.

Stephen Covey

Module Nine: Resolving Conflict

Supervisors are often called in to help mediate conflicts within their team, or sometimes within other teams. Although many people dislike dealing with conflict, when it is managed properly, it can be a positive thing. With the proper tools, people are able to air their ideas and their issues, share information in a constructive manner, and work towards resolving their differences. All of this should result in a more productive, respectful, open workplace.

Using a Conflict Resolution Process



Having a pre-defined conflict resolution process is a valuable tool. This process will give any supervisor an objective, neutral way to identify, explore, and resolve conflicts. We recommend using the OPEN technique.

O

- **On the Table**
- Identify positions, perceptions, interests, needs, concerns, goals, motivations...

P

- **Put the Problem into Focus**
- What is the problem? What is not the problem?
- Make sure you identify the real root cause. Problems are often not what they seem!

E

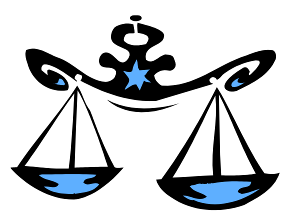
- **Explore Your Options**
- Brainstorm solutions. The objective here is quantitty, not quality.
- Once you have some solutions, **evaluate** and come up with a short list.

N

- **Negotiate a Solution**
- Always aim for win-win.

After a solution has been negotiated, make sure to follow up and make sure that the conflict has indeed been resolved and that the proposed solution is working. If it is not working, it's time to go back to the drawing board, perhaps with input from others (if appropriate).

Maintaining Fairness



During the conflict resolution process, it is very important that you remain objective and neutral to ensure that the process is fair to all. Key behaviors include:

- Never taking sides, even if asked
- Asking for, and encouraging, a response from all comments
- Remaining objective and neutral, and avoiding subjective comments
- Offering factual observations to both sides to help root out the key issues
- Encouraging win-win solutions
- Ensuring a balance of power is maintained, so that one side does not feel bullied or neglected

Seeking Help from Within the Team

At times, it may be appropriate to involve the entire team in conflict resolution. This often occurs when:

- There is a conflict between all members of the team
- There is a conflict between a few team members that is affecting the entire team

In these situations, it is important to have a face-to-face meeting of the entire team. Write the OPEN process on the flip chart. The team's input should be greatest in the first three phases. In the negotiation phase, you (as the supervisor) should ensure that the proposed solution will not negatively affect others or cause more conflict.

Seeking Help from Outside the Team

If the people in conflict are unable to resolve the problem with your assistance, and team assistance has not worked or is not appropriate, then it may be time to seek help from outside sources. This approach can also be used when you have a conflict of interest in the issue at hand.

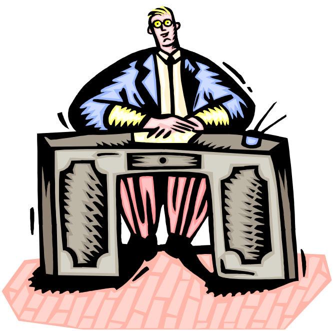
Outside sources can include:

- Other supervisors
- Mediators
- Human resources personnel

No one with authority over the team (such as your manager) should be considered, as they may intimidate the people in conflict and take focus away from conflict resolution.

> *I have yet to find the man, however exalted his station, who did not do better work and put forth greater effort under a spirit of approval than under a spirit of criticism.*
>
> *Charles Schwab*

Module Ten: Tips for Special Situations



Becoming a supervisor can happen in many ways. You may be hired from outside the company to take on a team. You might be assigned to create a brand new team. Or, you might be promoted from within the team. Each situation requires some special skills for success.

What to Do If You've Been Promoted from within the Team

Being promoted from within the team is often a huge challenge for new supervisors. It is difficult to make the transition from team member to team leader, particularly if you are now responsible for sensitive items, such as salaries or schedules.

To begin, start setting a good example from the moment that you think you may be promoted to supervisor. We all have bad habits; take this time to curb yours. Identifying the source of your bad habits and creating an action plan may also help you identify areas for improvement within the team.

Training can also be beneficial. Enlist your supervisor's help in determining appropriate topics. Some suggestions:

- Leadership
- Communication skills
- Time management
- Conflict resolution
- Giving feedback

- Team building

We have touched on many of these topics today, but there is always more to learn!

Take this time, too, to do some careful observing. What is the current supervisor doing? Which behaviors work for the team, and which don't? You will also want to get a clear job description and go over it with the current supervisor to make sure there are no surprises. You will also want to review the job descriptions for each team member.

When you take over the role of supervisor, have a meeting with your staff. Explain that you have taken over the role and its responsibilities. Clarify that things will continue as usual. It is important to spend your first few weeks settling into the role and understanding the big picture before you make any major changes.

One of the biggest challenges supervisors who have been promoted from within the team face is a lack of respect. For example, let's say you always had the habit of taking an hour lunch instead of 45 minutes, and most of the team had lunch with you. When you are promoted, you realize the behavior has to stop, but when you request that the team return from lunch on time, they remind you of your previous habits and tease you.

In these situations, simply provide a logical explanation for changing your behavior: "I know I often returned late from lunch before, but that was before I realized how much it was costing the company. The company has this rule for a reason, and I think it's important that we all respect it."

Above all, do not respond emotionally to taunts, teases, and jibes. A logical explanation, or a simple, "I don't think those kinds of comments are appropriate," should make your position clear in a professional manner.

What To Do If You're Leading a Brand New Team

Many supervisors feel that heading up a new team is one of the easiest tasks. After all, the team members don't know each other, so they have nothing to argue about. However, other supervisors feel that this is one of the most difficult, rewarding challenges a leader can face.

To begin, make sure that the team has a clear role and objective. This is particularly important for short term, task-based teams. Then, share this role with the team, and help them to focus on their new task. Often, employees who have been transferred to the team from within the company have a hard time letting go of their old positions.

Also, familiarize yourself with Tuckman and Jensen's stages of team development. We have included a brief explanation below.

STAGE	EXPLANATION	WHAT YOU CAN DO TO HELP
FORMING	Team members are just meeting; unsure of their role and themselves.	Encourage team building through non-conflict laden tasks and activities. Involve the team in task planning and goal setting.
STORMING	Team members discover differences and butt heads; conflict can interfere with progress.	Continue with the plan; evaluate and adjust as necessary. Support the team through conflict and help them resolve it.
NORMING	Team members start to discover similarities too. Performance typically improves, but social interaction may also cause it to drop.	Keep the group focused on the goal; encourage social activities outside of team time.
PERFORMING	Team members are now comfortable with each other and work together well.	Continue to offer resources and support to the team. Monitor performance, as teams can change stages at any time (particularly when members join in or drop out).

What to Do if You're Taking on an Established Team

Coming on board as the new supervisor for an established team can be a tough task. Your primary objective in this situation is not to appear as a threat, but rather as a helpful new resource and valuable ally.

To begin, gather information about the team's objective, team dynamics, and their history together. If possible, be introduced to the team before you start work as their supervisor, and spend some time watching them work.

It is also important to get started on the right foot. On your first day, have a team meeting. Explain your role and what you will be doing in the coming weeks. (Ideally, you should spend your first few weeks watching the team. Avoid making major changes if possible. Be an observer rather than a participant.) If you have been hired to make changes, set expectations for what will happen in the short term and long term.

> *I believe managing is like holding a dove in your hand. If you hold it too tightly you kill it, but if you hold it too loosely, you lose it.*
>
> *Tommy Lasorda*

Module Eleven: A Survival Guide for the New Supervisor

Being a new supervisor can be intimidating. How will you know what to do? What if you make mistakes? What if you don't know the answer? In our final module, we will give you some tips to get you on the path to becoming a great supervisor.

Ask the Right Questions of the Right People

Have you heard the saying, "There's no such thing as a stupid question"? It applies to supervisors and leaders too! Don't be afraid to ask questions. Just make sure to do your research first, and to ask the right questions of the right people. This means that if you have a question about front-line activities, for example, go to the frontline workers. Or, for questions about payroll, you would talk to human resources.

Remember, open-ended questions will typically give the most information. These questions ask, "How?" or start with one of the W's.

- Who?
- What?
- Where?
- When?
- Why?
- How?

If you're shy about asking questions, try using the phrase, "I'm just curious." For maximum effectiveness, these can be combined with the 5 W's and the H. Some examples:

- "I'm just curious, why do we process invoices by hand?"
- "I'm just curious, when are employee benefits renewed?"
- "I'm just curious, how often are these reports refreshed?"

Go to Gemba

"Gemba" is a Japanese term meaning, "the actual place." It is a key concept in Lean methodology, a manufacturing-based system that aims to create maximum value with minimum waste. (Although this process was designed for the manufacturing sector, it has many excellent principles that can be applied in different industries. For more information, read The Toyota Way by Jeffery Liker.)

"Going to gemba" means going to the place where the action is happening. If you want to see how invoices are processed, or if there is a problem with the process, go to the accounting department and watch the process yourself. If you want to understand more about how your company's products are made, go to the assembly line. Watch what is happening, ask questions from the frontline staff, and get some hands-on experience. This inside knowledge can help you make better, smarter decisions, and can help you help your staff work smarter. For maximum benefit, make sure your staff knows that you are there to observe and learn – not to judge or criticize.

Keep Learning!

The most important task for any supervisor is to keep learning. A supervisor's job responsibilities can cover many types of tasks, so there is always a lot to learn. Start small, but aim big. Set goals for yourself (see Module Three) and keep working towards them.

Key skill areas that we discussed in the last module include:

- Leadership
- Communication skills
- Time management
- Conflict resolution
- Giving feedback

- Team building

Training doesn't always have to take place in the classroom, either. Listening to your staff and colleagues, reading books and journals, and watching educational videos, are all excellent ways to learn more and keep improving yourself.

It is wise to keep in mind that neither success nor failure is ever final.

Roger Babson

Module Twelve: Wrapping Up

Although this workshop is coming to a close, we hope that your journey to improve your supervisory skills is just beginning. Please take a moment to review and update your action plan. This will be a key tool to guide your progress in the days, weeks, months, and years to come. We wish you the best of luck on the rest of your travels!

Words from the Wise

Include some quotes to wrap up the day.

- **Warren Buffett:** You only have to do a very few things right in your life so long as you don't do too many things wrong.
- **Peter F. Drucker:** Management is doing things right; leadership is doing the right things.
- **Steve Jobs:** Innovation distinguishes between a leader and a follower.