Three Essential Tasks

Workshop 3

Grace began at the health clinic as a receptionist, and she did very well. Recently, when the clinic expanded, she was named office manager, in charge of all the nonmedical staff. So far, she has found the new job difficult and very stressful.

This morning is typical. As she is helping Liya solve a problem with appointment schedules, Dr. Andrews bursts out of the back room complaining that she can't find any cotton swabs. "Are we out of swabs? How can we run short of something so basic? Who's keeping track of supplies?"

"I'm trying to," Grace answers, "but I have so much to do, I hardly have time to think."

"You have four people working for you," Dr. Andrews points out. "Can't someone take a weekly inventory? You don't have to do it yourself. Just see that I get some swabs, please, before I start tearing up shirts."

As Dr. Andrews walks away, Liya signals that Grace should take a phone call. "Another billing mistake," she whispers. The billing is being handled by Yuri, who is a reliable and conscientious employee but, unfortunately, new to the bookkeeping software the clinic uses. Because Grace trusted him, she didn't realize he was having trouble until complaints started pouring in.

Grace takes the phone and manages to calm the irate patient, who was charged twice for the same procedure. Then she notices that Dr. Andrews has reappeared, holding two boxes of cotton swabs. "Found these in a cabinet," the doctor says, and then adds sympathetically, "Grace, I'm sorry I snapped at you. But there has to be a better way of organizing the work around here and keeping things under control. Have you made any kind of plan? Think about it, and let's talk tomorrow."

What's Inside

Here, you will learn to

- ♦ set goals and establish plans
- ♦ organize work and assign tasks
- ♦ control work performance

The Core Functions

In the situation you've just read, can you identify Grace's problems? If you think back to Workshop 1 about the functions of a supervisor, you'll see that she was struggling with three functions in particular:

1. By trying to do too much herself, Grace was falling short in her duty to *organize the work and assign tasks*. Surely somebody on her staff could have kept a weekly count of basic supplies like cotton swabs, and Grace would then have had more time for tasks of greater importance.
2. By letting Yuri do the billing with software he didn't understand, Grace failed to *control work performance*. As a supervisor, she needed to be more aware of the quality of work done by her subordinates.
3. Finally, we can suppose that, in her struggle to keep up with urgent matters, Grace gave little attention to *setting goals and planning*. If she had set clear goals for her staff and devised a plan to reach them, she might have prevented some of the problems that cropped up. A plan would have helped her realize, for example, that a regular inventory was needed.

These three functions can be considered the core duties of a supervisor—the most essential tasks you will have to handle. That's why this workshop is called "Three Essential Tasks." If you don't manage these tasks well, you're not likely to succeed. In the following sections, you'll gain knowledge and skills that will help you handle these crucial supervisory functions.

Setting Goals and Planning

You may suppose that planning and goal setting are relevant mainly for the top managers of large corporations. Sure, Tim Cook has goals and plans for Apple, but if you're supervising a small team or department, what's the point? The goal is just to get the job done as well as possible, you may argue, and the plan is to work hard—isn't that enough?

Sorry, the answer is no. No matter how small the staff you are supervising, you need goals and plans. The following sections will show you why.

Why Set Goals?

When you play a sport, do you ever aim for a certain level of performance? Let's say you're on a softball team, and today you have a game against your chief cross-town rivals. Will you set a team goal of winning the game? Personally, will you set a goal of, say, at least one hit in three at-bats? If you play second base, will you aim to make zero errors in the field?

If you care about the game, you'll almost certainly establish some goals for yourself and your team. Doing so helps boost your achievement. Rarely has a championship been won by a team that didn't aim to finish first. Successful teams, and successful players on those teams, set high goals for themselves.

The same is true at work. Goals tell you where you're going, and they are excellent tools for motivating yourself and others. As a supervisor, you can hope your employees all have personal goals they try to meet, but for the team as a whole, it's up to you to initiate the goal-setting process.

Your goals may include raising productivity and improving schedules. They may involve helping your staff members learn new skills or perhaps increasing customer satisfaction is a major goal for you. In some cases, your own boss may charge you with meeting certain goals, but you should still extend and interpret those objectives in your own way. For example, if your boss says, "Your team needs to improve quality control," you can set an objective of reducing errors by a definite amount within a certain time period.

Tips for Setting Goals

- ✓ If possible, involve your staff members in the process of setting goals for the team. The goals will mean more to them if they take part in creating them.
- ✓ Make the goals challenging but realistic—that is, not too easy, but not impossibly hard.
- ✓ Define the goals specifically, in measurable terms. Rather than saying, "We want to increase our production," specify, "We want to increase our production by 15 percent over the next six months."
- ✓ Write your goals down. Doing so will help you clarify them.
- ✓ Be sure that all employees understand the goals and why they are important.

Why Plan?

Have you ever thought it would be nice to learn to sky dive? Or have you wanted to buy an old sports car and refurbish it? All of us have dreams of things we'd like to do sometime. And those dreams remain just that—mere pictures in our minds—unless we make plans to accomplish them.

The same is true of your goals at work. They will be only pipe dreams unless you set up definite steps for reaching them. Moreover, failure to plan can expose you to all sorts of crises. Too many mistakes will be made, and people will be working at cross-purposes. You'll find yourself spending huge amounts of time and effort coping with problems that wouldn't have arisen if you'd worked out a sensible plan beforehand.

Guidelines for Planning

Here are effective guidelines for planning:

1. **Make time for planning.** You may feel you're so rushed that you don't have time to plan. But unless you make time, the situation will never improve!
2. **Clarify your priorities.** Which of your goals are most important? Which tasks are most urgent? Plan to allocate resources where they are most needed.
3. **Divide your tasks into small steps.** If you're planning to raise production by 10 percent, what specific steps are involved in doing so?
4. **Determine the best order of the steps; put first things first.** Many managers go wrong by trying to accomplish a task before they take care of prerequisites. For example, you can't speed up a production line unless the employees have been trained to work faster.
5. **Set a timetable for implementing each step of your plan.** Choose a realistic date for accomplishing the overall objectives; then work backward from that date to set a date for each of the steps.
6. **Put your plan in writing.** Again, writing helps you clarify your thoughts, and you'll want to refer to the details of your plan at later stages.
7. **At periodic intervals, evaluate the progress and make adjustments.** Your plan may get off track if you don't monitor it. Often, in fact, it's a good idea to establish checkpoints as part of the plan itself. You'll read more on this subject later in this workshop.

ACTIVITY 3.1

NAME _____

Assessing Your Planning and Goal Setting

For each statement below, select the answer that best applies to you.

	Often	Sometimes	Never
1. When faced with a major task, I make a point of setting aside time to plan it before I start.	◯	◯	◯
2. I know how each of my tasks fits into my overall goals.	◯	◯	◯
3. I write out my plans on paper or on my computer.	◯	◯	◯
4. I define my goals in measurable terms so that I can check on my progress.	◯	◯	◯
5. I approach a large task by dividing it into small steps.	◯	◯	◯
6. Before rushing into things, I think about what I need to do first.	◯	◯	◯
7. When someone gives me a big deadline, I establish my own intermediate deadlines for separate parts of the task.	◯	◯	◯
8. I have to work hard to meet my goals, but they are all within reach.	◯	◯	◯
9. As I carry out a plan, I check to see how it is working, and then I make adjustments as needed.	◯	◯	◯
10. My planning allows me to concentrate on the most important things I have to accomplish.	◯	◯	◯

If you checked "Often" for every item, you may already be a good planner and goal setter. If so, think about how you can convey your goals and plans to people working for you.

If some of your answers were "Sometimes" or "Never," study those items and make a plan—yes, a plan!—for self-improvement.

Organizing Work and Assigning Tasks

Imagine that you're preparing a five-course meal for two dozen friends. You can't possibly do all the cooking yourself by the time the guests arrive—you need help! So four of your friends offer to pitch in. They arrive in your kitchen all at once, bumping into each other in their haste. Three of them start making pies when you really need assistance with the main course. To get the dinner prepared, you have to take charge. You need to determine an efficient way to divide up the work.

The same is true in your job as a supervisor. Whatever your line of business—and whether or not your subordinates already have clearly defined jobs—you'll face many decisions involving who should do what and when.

Recognizing When to Delegate

You've heard the old saying, "If you want a job done right, do it yourself." Many new supervisors follow this rule all too often. In their zeal to see the job done perfectly, they try to carry too great a load themselves. As a result, they become too harried to do anything right, and they have no time for effective planning.

Recognize that if you're the captain of your troop, you can't also be the lieutenant, the sergeant, and the corporal. This doesn't mean that you should act like a big shot who is too important for menial chores. Rather, it means that you should organize your own workload, and everyone else's, to serve the priorities you identified in your planning.

In general, a task can be delegated if:

- Someone else on your team has the skills and knowledge to handle it.
- You can explain the guidelines for performing the task.
- There is enough time for a subordinate to take over and become familiar with the task.
- Afterward, you will be able to judge whether the task was done correctly.

Tips for Effective Delegation

There are two basic rules for delegation that virtually everyone grasps:

1. Match tasks to the individual talents of your employees.
2. Check that no one has too much or too little to do.

Those points sound obvious, but they mean that you must be sensitive not only to the nature of the tasks to be done, but also to each employee's talents and needs.

Two other rules of delegation are not so widely recognized:

1. Whenever possible, delegate a whole job rather than just a fraction of it.
2. Along with the job itself, delegate as much authority and responsibility as possible. That is, allow the employee to make his or her own decisions, command resources, and take credit for the outcome.

This second pair of guidelines cannot be stressed enough. By delegating entire jobs with full authority and responsibility, you give your subordinates "ownership" of their work. This increases their interest and motivation.

Here are several further tips that can help you delegate tasks effectively:

- Explain each task fully, including the reasons for doing it and the criteria for performing it well.
- State deadlines clearly.
- Anticipate problems that employees are likely to face, and advise them how to cope.
- Provide any necessary training in advance.
- Monitor progress regularly, but don't keep looking over everyone's shoulder.
- If an employee needs support or assistance along the way, offer it promptly and graciously, without blaming the person for requiring help.

ACTIVITY 3.2

NAME _____

What's a Better Way?

For each of the following situations, point out what is wrong and explain how the supervisor could have handled the matter more appropriately.

1. Fred is unhappy because his supervisor has asked him to fill out a new form each week. The form requires him to list projects that are behind schedule and explain what the problems have been. Fred already has too much paperwork, and he doesn't see the point of doing more.

2. Jamie has to take the end-of-month inventory herself. Last month, she tried delegating the task, but the employee became confused and didn't do it right.

3. Noah's boss asked him to take over a project midstream, when it was already a mess. Despite what Noah thought were heroic efforts on his part, the project failed, and now it seems Noah is catching the blame from coworkers. He is angry at his supervisor for putting him in that position.

4. Loretta's boss asked her to order a dozen copies of a book on supervision but didn't provide a source. She added that chore to her list, but in the crush of other duties, she didn't get to it for two weeks. Now the boss is cross because the books haven't arrived in time for a training course he plans to teach.

Controlling Work Performance

Controlling work performance involves three basic steps:

1. Checking the performance: for example, monitoring schedules and quality and measuring output.
2. Comparing the performance to the original plan or to other established criteria.
3. Making the necessary adjustments to fix any shortcomings.

Controlling is a natural follow-up to planning and organizing the work. Your best arrangements may come to nothing if you don't monitor the performance. Good control procedures help you identify and correct mistakes, and they may give you early warning when the work starts to deviate from your plan.

> It's essential to have a grip, a clear understanding, of what your values and priorities are. Without a clear set of values, one decision is as good as another.
>
> **— Alvin Toffler**
> *Author, "Future Shock and The Third Wave"*

What Is Controlled?

Typical control procedures involve any or all of the following:

- Quality
- Quantity
- Schedules
- Costs
- Inventory

As a supervisor, you will also need to monitor and evaluate your employees, so your control system should allow you to check these elements as well:

- Performance of teams
- Performance of individuals
- Whether employees are on time and work the scheduled number of hours
- Employees' motivation and attitudes toward the job
- Employees' mutual cooperation
- Problems affecting staff morale

Control as a Process

Control should be a regular process, not a haphazard, hit-or-miss affair. Often the control procedures are built into the plan itself. That is, the plan specifies certain checkpoints at which you'll determine whether the project is on schedule, whether costs are within budget, and so forth.

The particular tools you use in the control process depend on the type of work and the information you need to acquire. You may use one or more of these common techniques:

- Standardized forms on which the employees record crucial data
- Computerized data files
- Regular progress reports (written, oral, or email)
- Group meetings at which employees report on the status of their projects

To speak of control as a process may make it sound terribly mechanical, like an automatic system that has little to do with people. In fact, it's just the opposite. Often, for a supervisor of a small staff, a crucial part of control is simply getting out among the employees, talking to them, finding out what's going on and what problems they're having. Formal status reports and data entries can be deceptive unless you're truly in touch with the daily work.

> What's measured, improves.
>
> — **Peter Drucker**
> *Management expert*

Whatever forms and systems you use, it is vital to inform employees about the control standards. People have to know what is expected of them. Moreover, they should know why it is expected, so that they can see you're not being arbitrary.

In enforcing the controls, you also need to strike a balance between firmness and fairness. Don't let a major project go wrong because you're afraid to criticize. On the other hand, don't berate someone for an insignificant deviation from your original scheme. Keep your priorities and the company's needs clearly in mind.

? Did you know?

The control process helps you identify problems and difficulties that your employees are having. If you genuinely want to assist them by providing advice and help when needed—and you convey that intention—they will open up and share their burdens with you.

Part of what you can do for your employees is to be their advocate with higher levels of management. For instance, if you see, through your control process, that employees are struggling with outmoded equipment, you can ask your own boss whether the equipment can be upgraded. You and your staff make a team, and the more you can do to establish an atmosphere of close and supportive teamwork, the easier your job as a supervisor will be.

ACTIVITY 3.3

NAME _____

What Controls Would You Use?

Imagine that you're a supervisor for a large manufacturing company. One of your team's jobs is to produce a monthly inventory of parts on hand. There are 150 different parts to be inventoried, using data from six different departments. The task is especially important this month because your boss is going to make a major presentation about inventory controls to senior management.

Until now, the inventory has been done by Susan, but she has just been transferred to another department. Her replacement, Jayson, seems smart and dedicated, but somewhat touchy about close supervision; he likes to think he can handle things by himself. This will be the first inventory report he has done. The software he'll have to use is rather complicated, but he says he understands what to do. What kind of control process will you establish? Answer the following questions.

1. How will you monitor the accuracy of Jayson's inventory reports?

2. How will you keep track of whether Jayson is on schedule?

3. How will you check his motivation and morale?

4. How will you explain your control system to Jayson so that he understands it and cooperates with it?

GETTING CONNECTED

To strengthen your delegation skills, you will profit from the article *"5 Levels of Remarkably Effective Delegation Skills"* at Inc.com

https://myqss.link/Delegation-Skills

For more information and tips browse through the articles, book titles, and courses that the search turns up. What themes are common to all the advice on delegation? What ideas do you find that are most relevant for you in particular?

WORKSHOP WRAP-UP

- Three essential functions of a supervisor are: setting goals and planning, organizing the work and assigning tasks, and controlling work performance.
- Goals should be challenging but realistic, expressed in measurable terms, and set down in writing.
- Effective planning involves setting aside enough time to plan, clarifying priorities, dividing the tasks into small steps, and establishing a schedule for each step.
- Organizing the work requires successful delegation of tasks, and delegation works best when you transfer genuine authority and responsibility to your subordinates.
- Control is a regular, ongoing process of checking on quality, schedules, costs, employee satisfaction, and any other important aspects of the job.
- In all of these functions, supervisors have the greatest success when they communicate their reasoning to their employees and encourage the entire group to think and work as a team.