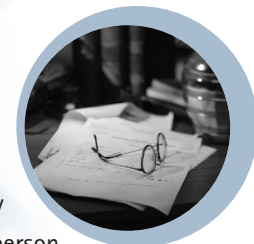


Management Matters



SUFFOLK UNIVERSITY
Human Resources

July 2007



Staying on Top of Things

*It's Worth Repeating**

We often assign tasks to ourselves to complete during the summer. You know – all those things we can't get done during the year? The problem is that the pace of work continues to escalate each year; summer flies by and we haven't carried out our good intentions.

I urge you to do one good thing for yourself this summer: begin documenting the many procedures carried out by you and your staff. This is not an attractive task, and it certainly won't be completed this summer. I hope to persuade you to get started on documenting procedures because it has multiple long-term benefits and it will allow you to be more confident that work is proceeding on time and on target.

Lisa Vigliotta,
Associate Director
of Human Resources
(ext. 8415, email
lvigliot@suffolk.edu)

All managers have multiple projects they oversee. The projects may be carried out by several staff members, but the manager is the person in charge and is accountable for the overall quality of the work in the office or department.

Mega-Processes

In a higher education setting, these projects are often mega-processes or ongoing, cyclical activities that span several months. They are complex and important, but they also may be routine and dull. And they always have far-reaching tentacles. We are not talking about the one-time special project with lots of pizzazz and attention. These are projects that are interwoven with others carried out elsewhere. Altogether, they slowly turn the wheels that carry forward the huge vehicle of work at the University and support its mission of teaching and learning.

Your Stress Level

Think about it. You may have a dozen of these mega-processes operating in the background and carried out by your staff at different times of the year. Your stress level may be intimately tied to how you set up, manage, and oversee these intricate, essential processes that represent the majority of your staff's time and effort.



Delegation

If you lie awake at night at 3 am wondering if every task on your 1,000-item to-do list is unfolding as it should...you have a serious delegation problem. Though you are responsible for the overall quality of the work in your office or department, you cannot and should not attempt to monitor and manage at the micro-level. You must delegate.

Back-up

If you are the back-up person who steps in when there is a near-miss of an important deadline or when a key member of your staff goes out on leave, you have a capacity problem. Your main role now resembles a relief pitcher for the Boston Red Sox. Critical to success... well, yes, but...who is doing your job while you are playing back-up for every member of your staff?

Documenting Procedures

This is the part we all hate. Documenting procedures is tedious stuff. Unless we have written down the key steps in each process, the timetable for each step, the people involved, what success looks like, and any pertinent notes about each step – it is not repeatable by others. We have no discernible “Plan B.” No one can step in to do the task unless it is YOU, sleep-deprived manager and pseudo-relief pitcher. Let us be clear: this is not what you should be doing.

continued on reverse side

*Content in this issue of Management Matters first appeared in *Field Notes*, a publication of Workplace Strategies LLC.

continued from front page



Documenting Procedures

Document information for each MAJOR task or project you are responsible for and you will reduce your stress level. You no longer need to be super-vigilant – you’ve got a self-monitoring system to ensure that tasks and projects get done. You will know essential details about when things occur, what the steps are, who is involved, what the success measures are, and any miscellaneous notes that are pertinent.



You Cannot Do It All

You cannot and should not document every step in the many mega-processes you manage. This is why you have staff. Get them to document the work they do by providing a simple blank template for this purpose. Show them how to use the template by providing an example.

How will you keep tabs on how work is unfolding?

You can do this by meeting with each member of your staff once a month for big-picture conversations about work and how it is going.

How will you get started documenting all these procedures?

Start by documenting one procedure that you own and use that example to train one or two other people on how to document one procedure they own. Now, you have two individuals who can train and coach others on how to document the projects they own. Target two more projects and two new staff members. Assign your “seasoned” staff to monitor this round. Keep up the momentum by targeting new projects and involving new learners and set them loose.

Oversight, Simplicity, Clarity

Your job is to provide oversight and maintain simplicity and clarity standards of the documentation. We don’t need every tiny step documented, just the steps in the process that are essential and will get you from point A to point B. One of the backup people on each project should be able to step into someone else’s shoes, complete the tasks slated for a particular month, meet the success criteria, and not miss a beat.

Big-Picture Thinking

Before long you will have a clear picture emerge that likely confirms what you intuitively know about busy months, slow months, colliding priorities, workload of individuals, versatility of skills, and where gaps and sinkholes exist. Documentation helps you to stay on top of things with “a view from the balcony.” From this perspective you can think and act more strategically to use your resources to get work done. You can make decisions based on hard information, not gut-feeling.

Make It Visual and Visible

Picture the final outcome of your documented procedures summarized on a poster: Here’s what we do in January, here’s what we do in May, etc. The poster can be hung on the wall as a reminder of the many huge projects that are unfolding, month by month, in the background. It is not the ONLY work that is done, but it shows the major projects or tasks that must be done and are sometimes taken for granted.

Major task/project: _____

Owner of this task: _____

Month	Steps	People Involved	Success Criteria	Notes
Jan	Document the basic steps done in January.	Note who is involved and how.	Clarify success for each step.	Identify potential problems and how to avoid them.
Feb	Etc.			
Mar	Etc.			