Mechanics

Level-III

Learning Guide-40

Unit of Competence: Monitor Implementation of Work Plan/Activities

Module Title: Monitoring Implementation of Work Plan/Activities

Module Code: XXX

LG Code: XXX

TTLM Code: XXX

LO 1: Monitor and improve workplace Operations

Instruction Sheet	Learning Guide #40

This learning guide is developed to provide you the necessary information regarding the following **content coverage** and topics:

- Monitoring efficiency and service levels on an ongoing basis
- Supporting operations of overall enterprise goals and quality assurance initiatives
- Identifying and adjusting quality problems and issues promptly
- Changing procedures and systems in consultation with colleagues
- Consulting colleagues about ways of improving efficiency and service levels

This guide will also assist you to attain the learning outcome stated in the cover page. Specifically, **upon completion of this Learning Guide, you will be able to**:

- Monitoring Efficiency and service levels on an ongoing basis.
- Operations in the workplace support overall enterprise goals and quality assurance initiatives
- Identifying Quality problems and issues are promptly and adjustments are made accordingly
- Procedures and systems are changed in consultation with colleagues to improve efficiency and effectiveness.
- Colleagues are consulted about ways to improve efficiency and service levels.

Learning Instructions:

1. Read the specific objectives of this Learning Guide.
2. Follow the instructions described below 3 to 3.
3. Read the information written in the information “Sheet 1, Sheet 2, Sheet 3, Sheet 4 and Sheet 5”.

Information Sheet-1	Monitoring efficiency and service levels on an ongoing basis

1.1. Introduction

Organizations are places where groups of people work together to achieve a common goal, or goals.

The organizations in which we work today are very different places from the traditional organizations of ten or twenty years ago.

There has been tremendous upheavals affecting peoples" working lives, and there is no reason to expect that workplaces and jobs won't go on changing at the same or an even faster, rate.

These changes can be both exciting and unsettling for people. Probably those most likely to adapt to change are those who are multi-skilled and who are open to learning new skills and doing things differently.

1.2. Overview of management responsibilities

Not surprisingly, the roles of managers and supervisors in the workplace have also changed in recent years. It is not uncommon now for a worker to have both management and operational responsibilities and to be part of a work team.

Managers are often responsible for staff who have multiple tasks and who move between jobs and tasks. Content-free managers are common.

That is, they have not necessarily been trained in, or worked directly in, the department or area they are managing. Most staff are directly or indirectly involved in setting goals for the organisation and working out ways to best achieve them.

A manager is responsible for coordinating the work people do to achieve specific goals. Because most organizations aim to make profits and meet customer expectations, managers are also required to make sure the work is done:

- Efficiently – that is, on time and within the given resource constraints
- Effectively – that is, the service or product meets quality standards and the job is done well.

1.3. Definition of a manager

A manager is also the person who deals with unexpected problems or issues and decides the most appropriate course of action to take.

Typically a manager has four functions:

- ✓ **Planning** – setting goals and targets, overseeing the development of plans, systems and processes for achieving goals, working out how best to get there within a budget
- ✓ **Organizing** – coordinating the resources, staff, plant and facilities to achieve goals

- ✓ **Leading** – providing the direction, support, encouragement, feedback and training staff need to do their job well
- ✓ **Monitoring** – supervising staff, and monitoring and adjusting systems and procedures to make sure goals are achieved as planned.

1.4. How do managers work?

Why do managers seem to work so differently from each other? Why is it sometimes so hard to pin down exactly what they do in a day? Managers will work differently depending on a number of factors.

Their level in the organization – executive, middle or direct supervisor
Their management tasks and approach will change depending on their level of responsibility within the organization.

1.5. Chief executive officer

For example, a chief executive officer (CEO) is likely to be more involved in:

- Dealing with the board of management
- Broad organizational planning
- Positioning the enterprise in the marketplace
- Securing large contracts for the business
- Balancing the finances of the organization
- Leading the enterprise as a whole

They are more reliant on conceptual skills.

1.6. Middle level manager

The middle level manager is more concerned with:

- Operational planning
- Establishing staffing levels within given budgets
- Dealing with unresolved problems
- Setting up systems and procedures
- Supervising sales and contracts
- Encouraging staff and setting up systems to support them.

They are likely to need strong planning and interpersonal skills

1.7. Supervisor

The supervisor – or line manager – is more likely to:

- Work directly with staff on a day-to-day basis
- Handle queries and issues as they arise
- Monitor their workload and workflow
- Verify systems are implemented and suggest changes if they are not working.

They are required to understand the technical details of how the operation is working, and they also need to have strong interpersonal skills.

1.8. he size and type of the organization they work in

In large organizations, roles and responsibilities are more likely to be defined and separated, and managers will work in specific teams or units.

In a smaller enterprise, staff may be required to work across a number of areas (for example, in sales and marketing and distribution)

1.9. The culture of the enterprise

All organizations have a culture or a mind-set or a particular way of operating. This is sometimes hard to define or even to find, but it will always be there.

The culture of a business is often described as „the way we do things around here".

The culture could be:

- Supportive of staff
- Customer-oriented
- Friendly
- Comfortable
- Casual
- Total quality management in focus/nature
- Blaming
- Negative
- Stressful
- Or any combination of the above.

1.10. What does 'monitor work operations' mean?

Monitoring is a process of determining how well our plans are being implemented. You cannot monitor something if you don't have a plan or basic structure of how something should be done, or a defined goal or target.

Work operations refer to the work itself and includes systems and procedures, staff performance, and levels of service in the workplace.

These operations can include:

- Service delivery – ensuring staff provide the level of service established/determined as appropriate for the establishment or department
- Customer satisfaction – generating feedback from customers about how they perceive the service being provided
- Products supplied and the nature of them – this can be the physical aspects and facilities of the rooms, drinks, food and entertainment we supply
- Dealing with paperwork – some staff may have as their main role the generation and administration of documentation: this has immediate impact on customers and internal calculation of statistics.

Information Sheet-2	Supporting operations of overall enterprise goals and quality assurance initiatives

2.1 Introduction

Management has responsibility for ensuring that operations in the establishment support the overall enterprise goals and, in some instances, quality assurance initiatives. This pre-supposes goals, objectives and targets do in fact exist, and they have been communicated to the appropriate staff and managers.
It is not safe to assume either or both of these exist or have been done. Check to see what applies in your workplace.

2.1.1. Enterprise goals and quality initiatives

- Many organizations have a way of operating called total quality management (TQM). This basically means all employees are involved in continually improving the level of service, productivity and customer satisfaction.
  TQM is regarded as a positive thing for organizations to be, or strive to become.

2.1.2 In a TQM organization:

- There must be full, top-down management commitment, support and understanding of the TQM philosophy
- It is important to get work systems and processes right
- Involvement of the whole workforce is necessary and this is done through teams
- Customer needs are identified and met
- Problems and issues are promptly identified and adjustments are made accordingly.
  If an organization has adopted a TQM philosophy, then its goals and workplace operations will reflect this approach.

2. 1.3 Why monitor and adjust?

There are good reasons to monitor progress and adjust plans.

The benefits are:

- Things are more likely to happen as planned
- Management and staff actually know what's going on in the business
- Problems are identified and corrected
- Service and product are consistent over time
- Work operations fit with work and organization goals

- Staff feel supported and involved
- Customer needs are met.

2.1.4 What is monitored in a quality environment?

Monitoring in a quality environment doesn't just rely on the inspection and checking of procedures and work done. It is a total concept whereby quality is built into every aspect of work operations and there is a continual process of improvement. It doesn't blame individuals but rather concentrates on seeking better ways to do things.
For example, the staff team at the Serenity Health Resort meet monthly and lately have really been concentrating on ways of improving customer service.

They have reviewed their procedure for taking bookings and have decided to cut out the two-step process of people having to speak to two booking officers if they want a swim and a massage
The new process means customers now only need to speak to one person who takes
both bookings. Even though the previous system worked well, it was not customer-friendly enough so it was changed by the team. Any aspect of work operations can be monitored with a view to improvement.
These can include:

- The procedures or systems that exist – such as bar or restaurant procedures
- The workflow – that is the order in which things are done (such as the sequence of cleaning a guest room)
- Whether or not there are gaps or overlaps in service provision The workload of staff – that is whether they are under-worked or over-worked at different times
- The time it takes to do a task or job Job design – that is whether jobs are challenging or interesting enough for staff
- Level of customer satisfaction with the service or product provided.

2.1.5 Who does the monitoring?

In the older style management, the manager monitored and controlled the work of the staff and made changes as seen fit. To some extent this is still true today, especially in premises that are owner-operated. In this scenario, the manager has the final responsibility for determining whether the goals set by the organization are achieved.

However, increasingly, today's manager will involve staff in setting the goals and in reviewing the progress of these, and coming up with ideas and solutions to problems.
This is usually done in a team setting.
So, the skills and work of the manager usually involve supporting, encouraging and training staff to monitor and report on progress and seek improvement.
It can be seen the structure of the organization has moved from a hierarchical „top down" orientation to a more devolved and lateral management approach.

Information Sheet-3	Identifying and adjusting quality problems and issues promptly

3.1. Introduction

Managers need to identify quality problems and issues quickly and take appropriate action swiftly. Failure to identify these issues and act appropriately creates an enormous potential for negative consequences for the organization including lack of repeat business, damage to the reputation of the venue and general decline in sales and profit.

An on-going approach to monitoring workplace operations is needed to identify and address these situations.

3.1.1 Scope of authority

In most cases, no explicit approval will be required to take remedial action to address identified quality and other issues. It will be assumed responsibility for taking such action resides with the job position. It is intrinsic to the successful and responsible execution of that role.

The ability of staff to take unilateral action in response to an issue is called their „scope of authority" and it will be prescribed by management. Different positions have different scopes of responsibility Where an issue falls outside their scope of responsibility, approval to take action may need to be obtained from:

- The department manager
- Other more senior/experienced staff
- The owner
- The establishment manager.

The extent of approval („authorization") required will depend on the factors that apply to the issue under consideration.

These may include:

- Costs involved
- Alterations required to existing Standard Operating Procedures
- Impact on other areas
- Impact on other staff
- Impact on customers
- Impact on service levels.

3.1.2 When to monitor work operations

Monitoring should be occurring all the time. You can predict problems ahead of time, monitor as you go, or review after the event. All of these are legitimate and effective forms of monitoring and most managers will use all three from time-to-time, depending on the situation.

3.1.2.1 Anticipate problems

This involves being able to „read ahead" and see certain systems or behaviours are probably going to result in problems or poor results.

For example, by predicting an employee is going to be overloaded on a public holiday and therefore roistering on another staff member a problem has been averted and a possible problem may have been converted into a positive outcome.

1.2.2 Correct problems as they happen

This involves being able to identify and solve problems as they occur, and being able to see the effects of making certain changes.

This is not necessarily an easy thing to do, because of workload and time constraints.
For example, an accident has happened in the restaurant because a waiter was carrying glasses in his hand which resulted in many trips between the bar and tables, greater spillage and also reduced levels of hygiene.
The problem was acted on immediately and a decision was made to ensure staff always use drink trays when transferring any glassware or beverages.

1.2.3 Correct problems after the event

Sometimes it is just not possible to anticipate a problem or to correct them as they happen.
The benefit of hindsight allows us to take time to review, reflect, consult and then make changes.
Also, sometimes problems are cumulative, meaning that many small instances can lead to a bigger overall problem.

1.3 Steps in monitoring

The following are the basic steps to undertake when monitoring:

1.3.1Work out what needs to be monitored

Not everything can or should be monitored all the time.
Some things will have been recently reviewed and are progressing well. Some systems generated reports will show that goals are being achieved according to plan and therefore no further investigation is required.

Generally, things to be monitored include:

- Areas showing early warning signs things are not going according to plan
- Areas of critical activity to the organization – high revenue raising streams, areas subject to intense legal scrutiny
- Areas due for scheduled review.

1.3.2 Decide on methods or measures to use

This is where you decide how to measure your progress. This involves using tools to help you do this. They include:

- ✓ Observation
- ✓ Statistical and written reports
- ✓ Surveys
- ✓ Checklists
- ✓ Flowcharts
- ✓ Benchmarking.

1.3.3Compare what is happening with what should be happening

Here you review and analyse what‟s actually happening. You may refer back to your original goals, objectives or targets and, using various tools, compare your progress against these targets.

Sometimes you will realise your original target was unrealistic or there have been changes that require you to adjust your original target.

3.1.4 Methods of monitoring

Methods chosen for monitoring performance are generally built into the planning process. It is a good idea when planning to keep in mind the reporting on the success or otherwise of goals. It is frustrating to set a goal but not be able to say whether or not it has been achieved.

There are many tools or methods available to monitor progress or outcomes of work operations. Some examples are:

- Reports – statistical, financial, written or verbal
- Obtaining customer feedback – verbal or written, individual or focus groups, structured or unstructured in format
- Using a pretend customer – getting someone to pretend to be a customer in your premises and then critically feeding back what it was like, what could be improved etc.
- Walking about the premises and observing what takes place and how it could be improved, what could be improved
    - Use of checklists to tick off whether or not required service points are being adhered to by front line staff when they interact with customers

- Brainstorming sessions where staff are asked to contribute any thoughts or ideas they may have about improving a particular aspect of service, or about introducing a new initiative
- Staff input and review – obtaining „grass roots" input to potential and actual problems, and asking those directly concerned about how the situation can be resolved.

Information Sheet-4	Changing procedures and systems in consultation with colleagues

4.1. Introduction

Adjustment of internal procedures and systems to improve efficiency and effectiveness is an on-going exercise, and involves monitoring of the internal and external environments, and the integration of findings into future planning as well as current practices.

4.1.1 Workplace changes

Changes in the internal and external environments impacting on workplace operations may include:.

Management changes

Changes in management may entail a variation in orientation to service, or the setting of some new directions in relation to several other factors.

What was acceptable under the previous management may not be acceptable to the new management.

This doesn't mean what was done before was wrong. It just means the new approach is different. Note too, changes in management often herald changes in client focus, and the creation of new and different target markets which, by their nature, will usually demand a change to practices and standards.

4.1.2 Organizational re-structures

The trend is to reduce or eliminate middle level management and with that comes new responsibilities for all concerned. As the organisation restructures, new roles for all staff in relation to numerous tasks (such as customer service, technical skills) will emerge.

People will have their responsibilities enlarged, or their focus altered.
To state the obvious, the industry is always in a state of change whilst sometimes desiring to portray the impression of tradition and stability. All this means new work operations may emerge and established ones cease to exist, or be extensively modified.

4.1.3 Introduction of new equipment

New equipment means training for staff and also requires that staff can explain the new equipment/facility, be it a product or a service, to customers.
The advent of the new equipment may have been necessitated by competition, brought about by down-sizing of staff or required by legislation.
This reality means managers must explain the new equipment and accompanying procedures to staff as well as organize and allow time for sufficient staff training and practice.

4.1.4 Recruitment practices

There may be a need to become more professional and more targeted in the recruitment of staff. This may require premises to establish comprehensive job descriptions and job specifications before advertising for staff, and then select staff based on how well these individuals match the stated job
requirements.

Use of job and task analyses may underpin the development of job descriptions and specifications. Some premises may elect to outsource their recruitment practices, employing private employment
agencies/consultancies, or accessing the free, national Job Network system.

4.1.5 Economic climate

Monitoring the media and discussion with our finance institution will help identify the state of the economy. There is no doubt the state of the economy is extremely influential on trade and we have to be prepared to respond to the emerging economic climate. At some times we can offer indulgent, extravagant, high-roller packages, whilst at other times we need to focus on low cost, budget, value-for-money deals.

As the market trends alter, so too do we as managers need to keep our finger on the income pulse of the organization and be prepared to trim staff rosters as the need arises. Reducing labor as trade decreases is all part of delivering efficiency and effectiveness for the property.

Communication is key at these stages. You must let staff know the reason for their reduced hours. Don't let them think their work is sub-standard. Tell them, explain to them, why the action has been taken including hours will be re-instated as trade improves.

4.1.6 Environmental issues

The demand for quality in the outer environment will place greater demands on how companies conduct their business, which sources of energy they use, and how they design their products: more establishments will seek to portray publicly their „green" and environmentally friendly image.

4.1.7 Technological development

Technological development has played a key role in the structural changes in the service sector. Boundaries between transportation, communication, travel-service and hospitality industries are disappearing as internet-based services proliferate.

Many customers are looking for seamless service. They seek a one-stop shop for all their holiday needs. Technology is providing the means for this to be done, and for customers to access it.

4.2. Developing standards and plans

The time spent actively considering your establishments orientation to adjusting procedures and systems should result in a set of standards and plans.

These must be in writing so everyone can be sure about them, understand what they mean, and know what is expected of individual staff members.

The precise nature of the standards and plans will vary between venues, and may even vary between departments within the same venue.

4. 2.1 Product quality

A statement may be developed about certain products and services where the guest receives a stated response such as a discount, extra service, extra product, free XYZ, if the product fails to comply or live up to expectations.

4.2.2 Document presentation standards

Policies may be prepared that specify document requirements for letters, menus, forms, invitations, reports, etc.

These may apply to format, type size, font, English or American spelling, and layout. They may dictate salutations, signatures required and closures. They may also specify copies required and filing requirements.

In other instances this issues may relate to the presentation of menus to ensure guests are only ever presented with neat, clean and presentable menus. Or it may apply to in room reading material to ensure that magazines and stationery is always of top quality, clean and not damaged.

4.2.3 Personal presentation standards

This is simply a list of requirements, separated into male and female sections stating the required dress, personal presentation and hygiene standards required of all staff by the establishment.

4.2.4 Complaint management

Any complaint really is an opportunity to rectify a problem, or make a long-lasting customer, providing they are dealt with quickly, properly and fully.

The standards should specify the steps to be taken for a range of complaints. There are several predictable complaints we are likely to get so it is possible to foresee the majority of them.

The standards should spell out the discretionary power that staff have to fix a complaint to the benefit of the customer. Whilst acknowledging we do not want to be exploited on the issue of

complaints it is worth bearing in mind no-one ever won an argument with a customer.
For every customer who actually does complain, there are probably another ten that had grounds to, but haven't. Simply stated, customers like to have their complaint treated seriously, acted on quickly and be apologized to.

4.3. Further approaches to adjusting procedures and systems

Approaches to the staff may include:

- Providing education and training service to staff, and aids and methods which help them to produce measurable improvements in quality
- Involving staff in planning and implementing quality improvement
- Building a spirit of working together towards goals
- Having instruments and channels to disseminate the company's philosophy, goals and values throughout the organization
- Promoting a climate of open communication and feedback
- Encouraging and recognizing innovation and teamwork
- Recognizing the right of every employee to understand the requirements of his/her assignment and to be heard when offering suggestion for improvement.

Approaches to the customers may include:

- Making the customer a „member" of the organization as opposed to a „customer
- Rewarding faithful customers – with special deals, discounts, verbal acknowledgment and thanks
- Communicating with customers in a way that promotes goodwill, trust and satisfaction
- Identifying customer's un-stated needs
- Ensuring customers" needs and reasonable requests are met
  - Ensuring customers" needs and reasonable requests are met

4.4 Identify and manage customer service problems

Monitoring and adjusting customer service also involves identifying customer service problems and making adjustments to standards, systems and procedures to ensure continued service quality. Problems commonly face any customers when dealing with any business that supplies service. The most serious problems found in service companies include:

- ✓ **Difficulties in contacting service staff**

This is especially frustrating to customers when they can see the service staff, and all those staff seem to be doing is talking amongst themselves and ignoring the customers. This frustration extends to telephone contact when the phone just appears to ring and ring before anyone answers it.

- ✓ **Lack of information about the services offered by the establishment**

There is really no excuse for any front office or concierge staff not to know about the venue and what it can offer. There is only slightly less excuse for other staff members not to know about the property either. All staff have an obligation to learn about their workplace so that they can accurately and readily supply information to those who ask

- ✓ **Unclear or incomplete price information**
  Customers are easily and understandably annoyed when they are unable to obtain quick and accurate price-related information. They readily become suspicious and become easily convinced we are either trying to hide something from them, o r trying to pull some sort of scam.

4.5 Customer orientation and customer care for continual quality improvement

The following actions can greatly improve the delivery of quality customer service levels:

- Give benefits to key customers – we must reward people for their on-going custom. This may be with some tangible „gift" or discount, or simply by the recognition we give them, and the enhanced services we provide them with
- Systematize customer complaints and learn from them – factor in the results of analysis of poor customer service so you will avoid repeating those mistakes
- Train staff in customer care – conduct sessions explaining and illustrating company policies and procedures in relation to quality customer service
- Give staff the authority, discretion and resources to make quick decisions – they must act to handle dissatisfaction, or to reward faithful customers: staff should act as advocates for customers
- Stimulate employees to be creative in developing customer care activities – reward any staff initiative in this area. Try to generalize the use of any new initiatives. Allow staff room to make mistakes. No-one is perfect and anyone who tries something new is bound to make a few mistakes!
- Invest in meetings and regular contacts with customers via newsletters or customer magazines – make the customers feel they are truly part of the decision-making process, and they have valuable input to make into the operation of the property
- Making it easy for customer to complaint – be proactive in soliciting complaints and encourage complaints as a way of identifying the things that need fixing in order for you to move to the next level.

Information 5	Consulting colleagues about ways of improving efficiency and service levels

5. Introduction

Effective managers will recognize the need to consult with colleagues about the best ways to improve efficiency within their unit or department, and to raise customer service levels. Useful consultation means that staff must be actively encouraged to provide input to the development of quality customer service, and to the identification and resolution of issued that impact on its delivery.

5.1Consultation advice

Consultation with staff should include:

- Encouraging staff to feedback all relevant comments from customers – most people won‟t make a formal complaint but will often make deliberate and pointed comments in front of staff. These must be reported back where they are central to improving service delivery
- Not shooting the messenger – if staff are to be encouraged to feedback negative criticism, it is very important not to criticize them simply for delivering the bad news
- Establishing agenda items – every staff meeting should have a standing agenda item for „quality feedback‟ or similar. These staff meetings should be regular in nature, be made compulsory, and have provision for getting the information that arises back to staff that weren't there due to sickness, leave or RDOs
- Providing written protocols – these ensure everyone is aware of the same thing in regard to service delivery, quality standards and establishment practices. Never assume staff know exactly what is required. They may never have actually been told. Far too many things exist in the workplace as matters which have evolved over time without any real direction, support or structured dissemination
- Providing for written feedback – the establishment should have documents for staff to complete in writing if they don't feel comfortable with delivering verbal feedback.

5.2 Provide feedback to colleagues and management to inform future planning

Businesses always look for managers to make incisive and intelligent contributions about how the property should be operated and how things can be improved – refer earlier comments regarding TQM.

This is because operators realize managers and staff are the front-line people in the organisation. It is they who have regular contact with customers so it is they who should be best placed to give feedback about ideas that may enable the property to better meet the future needs of customers.

Remember, all businesses should strive to be customer focused and all significant changes to service provision need to be appropriately planned.

5.3 Suggesting ideas

Sometimes, on the basis of the research you have done or the experience you have encountered you will feel that adjustments have to be made to various products and services to bring them more in-line with the customer demands.

This research may have been collected through watching customers, over-hearing their comments, being given direct feedback by them, or as a result of having seen a good idea at another venue

Providing you can substantiate your claims, the property may make the adjustments you believe are necessary

5.4 Who might these suggestions be made to?

Depending on the size and structure of the workplace you may make your suggestions to:

- The owner
- A board of directors
- A senior management group/committee
- Head office.

Suggestions for minor adjustments can often effectively be made verbally, but where you are proposing more substantial changes the preferred method is to make the suggestions in writing, accompanying them with any supporting evidence you might have. Substantial changes are changes necessitating:

- Significant expenditure of money
- Significant time to implement
- Significant alteration to existing policies and procedures.

5.5. Evaluate current and emerging industry trends and practices

Keeping up-to-date with what is happening in the industry is an essential pre-requisite for managers. The dynamic nature of the industry demands managers stay in touch with new trends, new technologies, new practices or new legislation, just to name a few. This information must be analysed and then factored into individual workplace performance.

5.5.1What are the sources of information?

There are many sources of useful information. Some of these are generic in nature and others are specific to the industry.

- ✓ Written material
- ✓ Internet
- ✓ Conferences and seminars
- ✓ Product launches
- ✓ Industry associations
- ✓ Colleagues, supervisors and managers
- ✓ Market research data
- ✓ More on developing your own industry network
- ✓ Talking to the reps

5.5.2 Steps after collecting information

Information is of no value unless it is used. When you have the information you should:

- Take the time to read, digest and understand it – what is it saying? Is it applicable to your venue or department? How is it relevant?
- Determine the impact of incorporating this knowledge in to the operation of the property – what would need to change in the venue to adopt this knowledge? What impact would such a change have on other areas, training, service flow, existing systems etc?
- Consider the costs of implementing the knowledge – what would it cost? Also consider the cost to the venue of not introducing or acting on this information
- Talk to others – to get their opinion and input. What are their thoughts? Do they agree with you are do they hold contrary views? What are their reasons for agreeing or disagreeing?
- Generate a proposal – detailing what you want to introduce or change and why. Make sure the proposal is coasted and details how the proposal would be implemented and the flow-on impacts on other areas
- Make a presentation to senior management about your idea.

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Mechanics

Level-III

Learning Guide-41

Unit of Competence: Monitor Implementation of Work Plan/Activities

Module Title: Monitoring Implementation of Work Plan/Activities

Module Code: XXX

LG Code: XXX

TTLM Code: XXX

LO 2: Plan and organize workflow

Instruction Sheet	Learning Guide #41

This learning guide is developed to provide you the necessary information regarding the following **content coverage** and topics:

- Assessing current workload of colleagues accurately
- Scheduling work in manner of enhancing efficiency and customer service quality
- Delegating work to appropriate people with principle of delegation
- Assessing workflow against agreed objectives and timelines
- Assisting colleagues in prioritization of workload
- Providing input of appropriate management regarding staffing needs

This guide will also assist you to attain the learning outcome stated in the cover page. Specifically, **upon completion of this Learning Guide, you will be able to**:

- Assessing Current workload of colleagues accurately
- Scheduling Work in a manner which enhances efficiency and customer service quality.
- Delegate Work to appropriate people in accordance with principles of delegation
- Assessing Workflow against agreed objectives and timelines and colleagues in prioritization of workload.
- Providing Input is to appropriate management regarding staffing needs.

Learning Instructions:

1. Read the specific objectives of this Learning Guide.
2. Follow the instructions described below 3 to 3.
3. Read the information written in the information “Sheet 1, Sheet 2, Sheet 3, Sheet 4” Sheet 5”and Sheet 6”.

Information .1	Assessing current workload of colleagues accurately

1. Introduction

As a manager you are required to ensure that staff is able to meet targets and goals that have been established. This involves an understanding of and an ability to organize and manage work operations.

1.1 Your role as manager

Some of the essential elements of being a manager involve:

- Motivating staff
- Determining workloads
- Scheduling work
- Prioritizing work
- Organizing workflow
- Delegating work.

1.2 Motivating staff

Focused and motivated staff are more productive. Beyond earning an income, staff wants to contribute to the organization and see they are making a positive contribution. As a manager you can increase their job satisfaction by:

- Taking an interest in their development – both at work and outside it
- Being clear to them about how you judge and measure their performance – so they know what you deem to be important, and what isn't. This is useful to them where they need to priorities their workload
- Caring about their safety, health and well-being, and taking visible steps to safeguard them
- Treating them personally – being respectful to them, using good manners and listening to them
- Giving them achievable objectives
- Giving them positive feedback and encouragement – especially where they fail to perform, so they learn that „trying" is the important aspect: few successful managers criticize staff for trying even when they don't achieve their goal.

1.3 What motivates people to do their best?

Much of the motivation on research talks about incentives and rewards, which can be very successful in marketing and sales positions.

However for many people, job motivation is driven by more personal reasons – money is frequently not a prime motivator but certainly can be in certain circumstances and to some people.

The motivating factors can be:

- A sense of achievement
- Recognition for a job well done
- Enjoying the work itself
- Having responsibility
- Having opportunities for advancement.

1.4 Workloads

In this context, workload is the amount of work an employee is required to do in a set period of time.

As a manager your task is to ensure employees are not under-utilized or, conversely, overloaded with too much work. Of course this is not necessarily an easy task in the hospitality industry because of the peaks and troughs in business, and because of the uncertainty of unexpected arrivals, such as a bus load of tourists dropping in for afternoon tea or a quick unannounced dinner before the show.

Staff who work in this industry expect high volume periods of work. They understand it is part and parcel of the nature of the business. However, it is your responsibility to make sure most of the time staff have a manageable workload where they are kept busy but are not under continual stress.

There are also sound business reasons for managing staff workload.

If a customer waits too long for service, they will simply choose to go elsewhere – either right away or next time.

There are a number of ways of determining an appropriate workload:

- This is worked out over time through practice and observation – this very much a „suck it and see" approach, which while sounding less than professional has much to recommend it, especially the fact it is rooted in practice, reality and actuality

- Ask staff for their feedback – how did they feel? Did they feel stressed, under pressure? Or did they in fact enjoy the experience of being flat out?
- Be aware of other factors impacting on staff time and contributing to their total workload – they may be expected to undertake duties for other staff members, other departments, special guests or delegated managerial duties such as banking, counting money, stock taking or delivering stock
- Prioritizing tasks into primary and secondary tasks such that the secondary tasks are ones to be done in quiet times.

1.4 Schedule workloads

Scheduling work in a manner that enhances efficiency and customer service quality can be seen to involve prioritizing work, and then organizing an appropriate workflow to achieve the set targets.

Scheduling work means planning and allocating what tasks have to be done in a specific period of time, and by whom.

Scheduling work is really the end result of:

- Working out the unit's priorities – which may be based on turnover, profit, covers, rooms provided or services, timing, establishing market share or whatever else is paramount at the time. The point being priorities shift over time. What was vital yesterday, may not even be a consideration next week
- Working out the most appropriate workflow – this includes consideration of timing requirements, the physical availability of resources (physical and human), layout of the facility and equipment, and processes which have to be performed
- Having assessed the staffing levels and the appropriate workload for individual staff members – which is based on your personal knowledge about individual abilities and capacities
- Having decided on delegation of tasks – as a manager you cannot physically be in all places at all times and so you will need to delegate certain authorities to various staff from time-to-time. These staff need to prove they are responsible, committed and have the best interests of the company, the other staff and the customers at heart.

1.5 Prioritizing work

Prioritizing in this context involves deciding on, and placing tasks in, their most effective order of importance.

This order must match with the identified goals and targets of the organisation, and the objectives of individual work units, teams or departments.

As a manager of a work unit or department you will be responsible for prioritising the work of the unit. Staff will look to you for leadership in relation to where their efforts should be directed. Where you fail to deliver this direction, your credibility may suffer.

The four basic steps in prioritizing work are:

- Involve staff in the process wherever possible
- Make three lists:
  - ✓ The essential tasks that absolutely, positively must be done no matter what with no excuses, no exceptions
  - ✓ Those tasks that are non-essential but that add quality to the performance of the department or unit
  - ✓ Those tasks that it would be nice to do if there is sufficient time but which are in no way important or essential
- Compare the lists you have generated with the overall goals and objectives of the unit
- Adjust the lists accordingly, allocate the work and take action to achieve the lists in priority order.

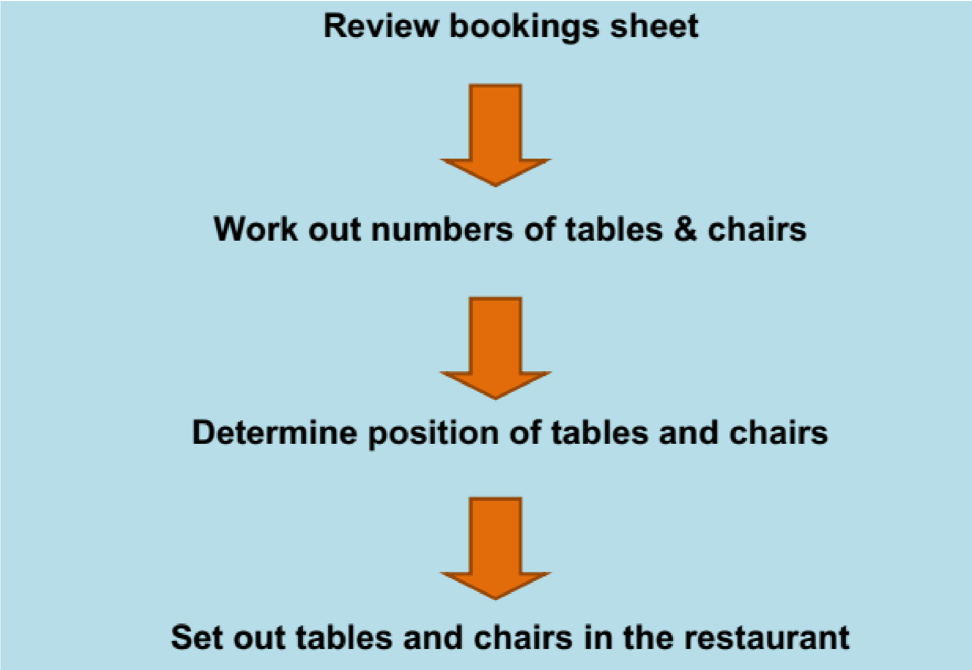
1.6 Organizing workflow

Workflow is basically the order in which work is best done. Organizing this involves determining the logical sequence of tasks. The aim is to make sure the job is done efficiently and effectively. Things to take into account when organizing workflow include:

- How long each individual task should take
- Recognition of staff needs and award requirements such as breaks
- The number of people to best achieve a result or task
- Occupational health and safety requirements
- The most logical order of tasks to avoid duplication and gaps in service
- The suggestions of staff that are actually doing the job.

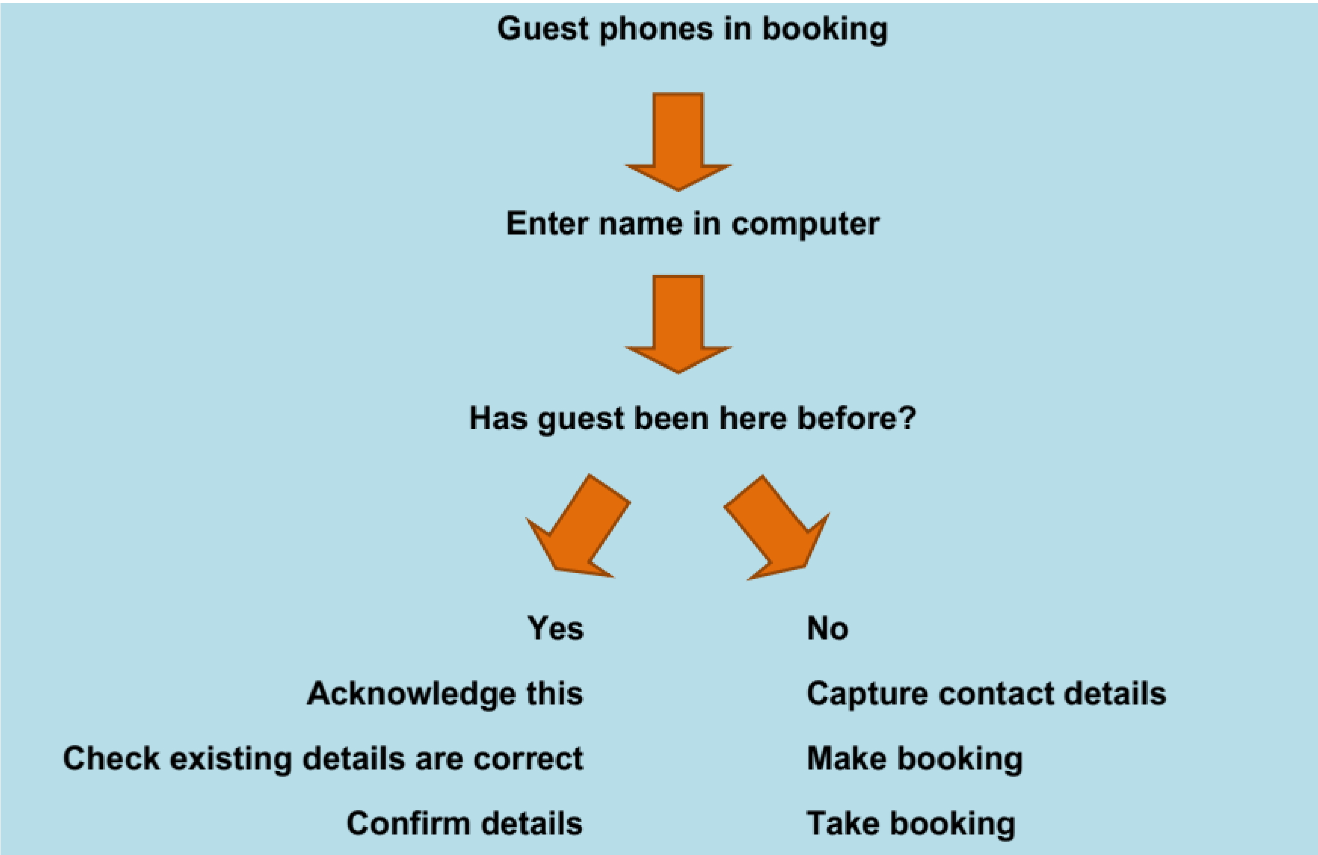
A useful tool for working out the appropriate workflow is a flowchart.

A simple flowchart for preparing a restaurant for customers is:



A flowchart is particularly useful if the work process involves some decision points, as the flowchart shows the appropriate path to take at each point.

An example of this is a hotel guest reservation system:



Information. 2	Scheduling work in manner of enhancing efficiency and customer service quality

1. Work schedule

A **work schedule** generally refers to the days per week and the hours per day that an **employee** is expected to be at their job. For example, some jobs have **work schedules** that change, depending on the season. Make sure you know the **work schedule** for any job before accepting a position.

1.1 Types of Work Schedules

A work schedule generally refers to the days per week and the hours per day that an employee is expected to be at their job. There are several different types of work schedules, which vary based on the organization and the position. Your schedule can also vary based on the time of year. For example, some jobs have work schedules that change, depending on the season.

Make sure you know the work schedule for any job before accepting a position. This will help you avoid any surprises when you start work.

1.3 Check the Work Schedule before Accepting a Job

The type of schedule required for a job is typically included in the job posting or explained during a job interview. However, if you’re not clear about the hours, check with the employer prior to accepting a job offer.

It's important to know if the work schedule will fit with your lifestyle and other responsibilities, like family or school.

Even if a job is listed as full-time or part-time, you might want to follow up with questions about what your weekly schedule would look like. For example, one job seeker accepted a salaried job where she expected to work 40 hours per week, only to find out that the expectation was for 50. On the flip side, another applicant accepted a part-time job that he expected to be 25-30 hours a week. The employer scheduled him for 8-10 hours, and even less some weeks.

You might also double-check the days each week that you are expected to work. For example, some jobs require you to come in on weekends, while others are only Monday through Friday.

1.4 Types of Work Schedules

1.4.1 Full-Time Work Schedule: A full-time work schedule often requires a commitment of 37-40 hours per week. Because of the long hours, most jobs with full-time schedules are eligible for employee benefits. These benefits can include vacation and sick days, health insurance, and different retirement plan options.

Full-time schedules vary from company to company, but most of the time, employees will work the same shift every week. The most common full-time work schedule is a variant of 9:00 AM to 5:00 PM, Monday through Friday, adding up to 40 hours per week.

While most full-time work schedules are normally the same shift each day, in some cases (like retail), shifts can vary, but the number of hours will still add up to 35-40 per week.

Full-time non-exempt workers generally receive overtime pay. This happens when the hours worked exceed the established 40-hour maximum. Overtime is paid at a minimum of base hourly pay plus a half of that base pay, also known as “time and a half.” This is typical for people who get paid hourly.

Exempt employees are not generally eligible for overtime. Most exempt employees receive a salary instead of an hourly rate.

1.4.2 Part-Time Work Schedule: A part-time work schedule is any schedule less than full-time employment. The benefit of this type of schedule is that it allows for greater flexibility to maintain other responsibilities outside of work.

Part-time work often does not include benefits offered to full-time employees, and hours can be erratic and inconsistent from week to week. An example of a part-time work schedule could be Monday through Wednesday from 7:00 AM to 11:00 AM and Saturday and Sunday 11:00 AM to 7:00 PM.

1.4.3 Fixed Work Schedule: A fixed work schedule is a timetable that generally consists of the same number of hours and days worked per week. Fixed work schedules tend to stay consistent once the number of hours and the days have been agreed upon by both the employer and the worker. An example of a fixed schedule would be Monday through Friday from 8:30 AM to 5:00 PM or Thursday through Sunday from 3:00 PM to 11:00 PM.

1.3.4 Flexible Work Schedule: A flexible work schedule is less rigid than a fixed schedule. Employees and employers work together to determine the number of hours and days of the week the employee will work. Depending on the employer's policy, employees may be expected to work a minimum number of hours or be at work at a certain daily block of time, but shifts can often be switched with other coworkers in order to satisfy the needs of the employer and the busy life of the employee.

Flexible work schedules can vary infinitely, but an example might look like: Monday - 9:00 AM to 12:30 PM, Tuesday - 11:00 AM to 4:00 PM, Saturday and Sunday - 2:00 PM to close.

1.3.5 Rotating Shift Work Schedule: Rotating work schedules cycle employees through day, swing, and night shifts. This cycle helps to distribute different shifts between all employees so that no one is stuck with the less desirable hours every shift.

This work schedule is not as common but can be seen in many careers like the military, construction work, roadwork jobs, power plants, and health care. These shifts can cycle weekly or quarterly, depending on the type of work required.

For many employees, the transition between the different schedules can be tricky. Sleep and eating patterns change and the employee may see their family and friends less because of their rotating schedule.

This type of timetable does have some benefits. Employees are able to spend more time with family and friends during their normal work hours, and may be able to run errands they normally would not be able to complete. Hours can cycle between day shifts (7:00 AM to 3:00 PM), swing shifts (1:00 PM to 9:00 PM), and weekend, night, or overnight shifts.

2. Planning and scheduling of work

It is important to understand the difference between planning and scheduling. These two elements of maintenance management are essential and are very often mixed up. Most organizations, where scheduled shutdowns of the manufacturing process are common, plan and schedule work quite good because there is a consequence if they do not.

Planning and scheduling of weekly/daily On-The-Run work is often very poor. Perhaps this is because of more lax expectations on performance than during a shutdown?

The short definitions used here are:

Planning of work = Deciding What, How and Time to do work. Scheduling of work = Deciding When and by Whom work will be done.

2.1 Planning of work is to prepare everything needed to do the work. E.g. Scope and description of work, any safety requirements, tools, parts and material, documentation, need for scaffolding, skills required, shut down required or can be done without interference with production etc.

2.2 Scheduling of work is to first decide when job shall be done by date/time and who will do the work.

A best practice is to plan work before work is scheduled for execution and to schedule to the work that need to be done and then schedule people to the work.

All work can be planned but all work cannot be scheduled.

To plan work is the easy part if you have dedicated people who are allowed to focus on planning. Even correction of a break down can in theory be planned because you know it can, and most probably will happen, but you cannot schedule all work because you do not always know when the break down will occur.

Most breakdowns can be prevented but all failures cannot be prevented. This is because all failures do not have a long enough failure-developing period. The failure-developing period is the period in time that lapses from the point in time you discovered a failure until the break down occurs. If this time is too short the failure will develop into a breakdown before the corrective action can be planned. This is common for electronic components. Before problems in systems with electronic equipment can be corrected troubleshooting has to be done. Breakdowns can still be prevented with redundant components.

Information 3	Delegating work to appropriate people with principle of delegation

1. Introduction

What is delegation work?

Delegation occurs when someone with authority confers upon another person the power to do a particular task. **Delegation** is usually a one-way street - superiors **delegate** authority to subordinates.

1.1 Delegating tasks to staff that are part of their duties

The way that you tackle the delegation of tasks to staff depends on the level of staff you are supervising.

Obviously the more responsibility a staff member has, the less likely you are to delegate specific tasks to them.

You are more likely in this instance to agree on goals or objectives and the employee will then go about determining and prioritizing their own tasks.

But, with less experienced or more junior or lower level positions, more direction is required on the part of the manager.

Some points to consider when delegating tasks in this instance are:

- Make sure you are clear about the task to be done – if you don"t know what you want done how can you expect to convey this to someone else?
- If appropriate, explain why the task has to be done, and why it has to be done in the way you are specifying – clear communication is critical
- Choose an appropriate time to inform the staff member about the delegation, and don"t hurry the explanation
- Provide whatever instructions are necessary in the correct sequence, explaining all of the steps
- Provide training and demonstration, as required
- Continually check if the employee has any questions and encourage them to ask questions – ensure your replies underline you expect and encourage questions
- Continually check the staff member genuinely understands what is being said and shown to them – you may ask them questions or get them to demonstrate what is required
- Give them positive feedback – people operate better from a platform level of optimism and success, so make them positive and confident.

Essentially, staff must be treated with respect and you must be fair in the work you delegate by sharing it around amongst the entire staff and not appearing to victimise an individual or group.

When delegating you may run up against problems such as:

- Age differences – where you as a younger person are trying to delegate to an older person

- Experience differences – where you as a relative newcomer to the industry are trying to delegate to an oldhand
- Gender issues – where the opposite sex takes exception at you trying to “tell them what to do”.

The basics remain the constant – treat people with respect, explain your requirements, solicit questions and answer them truthfully. Thank people for their cooperation.
It is better sending time motivating and training staff, than just giving orders.

1.2 Delegating some of your own duties to staff

There are real benefits in delegating some of your own work to other staff:

- It frees you up to do other things
- It gives staff experience at managerial type tasks, providing them with additional skills and potentially more interesting work
- It promotes a team approach by sharing tasks amongst everyone – it signals you have faith in their work, efforts and decisions
- It supports the career advancement of staff – wise staff will realise you have to be able to take orders before you can give them, and they will also regard delegation as an opportunity to show their worth to others. It also provides them with the opportunity to add new skills to their resume.

2. Principles of delegation

By way of providing a summary of the above, the principles of delegation relate to

- Knowledge of team strengths and weaknesses – who is good at what? Who wants to be challenged and extended? Who prefers just to do what they have always done?
- Knowledge of context-specific factors such as resource constraints, organizational goals, legal requirements and company policies and procedures
- Self- knowledge – about your ability to communicate and motivate staff, about how well you know the needs of the customers and the property, about how well you trust your staff.
- Evaluation – to determine how effective the delegation has been, if it should occur again and to learn the lessons contained ion that delegation experience.

Information 4	Assessing workflow against agreed objectives and timelines

1. Introduction

Managers should assess the performance of staff against their agreed objectives and timelines.

This should be done on an ongoing basis during work hours and also at scheduled times in terms of formal performance appraisals.

1.1 Assessing workflow and progress during work

the three keys are:

- Walking around the venue to observe what is happening – this includes observation of staff practice and observation of customers. This could be body language, waiting times or listening for comments
- Mentally matching what has been achieved against what is needed – many things in the industry have timelines attached to them. For example, diners expect the restaurant to be open at 6.00am and breakfast available until 10.30am
- Taking action to assist where indicators show the necessary work will not be completed on time, as required.

1.2 Staff appraisals

In many organizations staff appraisals are an ongoing Standard Operating Procedure while in others they are undertaken only where there are indicators of problems. These should not be undertaken unless there were originally some definite objectives and timelines set for staff to achieve and unless these were agreed to. It is advisable to nominate, in advance, when this appraisal will take place so staff are well aware it is going to take place, they know it has been planned for and it will be treated and taken seriously. Appraisals that „just happen" are not well regarded by staff, and are even less favourably considered by other managers. The fact that staff appraisals should have been mentioned at the staff interview and again during the Induction and Orientation so workers know it is a standard part of working in the venue. When the set date and time for the appraisal are nearing it is worth reminding the staff member concerned. You should arrange a quiet and private space, free from interruptions and distractions for the appraisal. The meeting should be friendly and informal. It is an exchange and sharing of information, compared to a top-down event where managers „tell" staff. As an opening gambit ask the staff member how they think they are going in relation to their goals.This a good way of letting them have the first say if they believe their performance has been below expectations. It is a good tactic because it is them who are verbalising the bad news, not you. Allow the meeting to take whatever course is necessary providing the general focus is on the staff member‟s performance.

You can expect the following to be covered:

- Overall feeling of personal performance
- Reasons why targets were or were not attained
- Relationships with other staff which appear to be beneficial or a hindrance
- Problems with equipment and process
- Timelines for work giving rise to problems
- Problems with patrons
- Resourcing issues.

Where a problem is identified by the staff member, your role is to collaboratively identify remedial action to be taken to resolve the issue. Solutions may include allocating more time, more resources, training, job sharing, or mentoring. Always work towards getting the staff member to agree with the plan of action decided on, so as their commitment to the solution is enhanced. Never try to simply impose a solution on the person.

Try not to dominate this discussion. The perfect meeting is one where the staff member does most of the talking and feels comfortable sharing examples of failing to achieve a set target. A meeting dominated by the manager runs the risk of sounding like a lecture, and resulting in anti-management sentiment.

Often, staff comes to their own solutions when encouraged to talk things through. This meeting is also an opportunity for you as manager to share your views on how the worker is progressing.

You may have information about:

- Compliments and complaints from patrons
- Compliments and complaints from other workers
- Instances – specific in nature, not vague generalisations. For example where you have observed noncompliance with procedures
- Specific examples of outstanding work performed.

The review also provides you with a great chance to talk one-on-one and share further information such as up-coming events, emerging issues, promotional opportunities, operational problems, their attitude to delegation of work and so on.

The meeting should conclude by:

- Re-capping issues raised by both parties
- Setting targets and measurable objectives for the next period
- Identifying support or training required to achieve the set goals
- Setting a time and date for the next review.

1. Introduction

Times will arise when there is a need for you to assist staff members in the prioritisation of their workload.

Critical elements in providing this sort of help are the use of feedback and coaching.

1.1 Feedback

Feedback may be seen as the on-going verbal and non-verbal support provided to staff as they seek answers to the perpetual question "How am I going?" Verbal responses include answers to both asked and implied questions with statements such as "Looks like you"ve got the hang of that pretty well", "Well done", "Looking good", "Good job".

Non-verbal responses can include a smile or grin, a nod, a silent hand clap, a physical pat on the back, the thumbs up sign or making a circle with the thumb and the forefinger. Managers realize it is feedback that turns a monologue into a dialogue. Without feedback staff may as well be talking to themselves.

Naturally where negative feedback needs to be done, it should be communicated in a sensitive and empathetic fashion, usually in private. Any negative feedback must concentrate wholly on actions and not blur into including the personality of the staff member concerned. It is important to just stick to the demonstrated facts.

Negative feedback is best delivered using a technique called the „Positive-Negative-Positive" sandwich.

This means you say something positive about the staff member's performance, deliver the negative feedback and close again on a positive note.

For example: "I'm very happy with the way you are working as part of the team and helping others out when they need it, however I think there is room for improvement in the XYZ area but overall you are working well and making a valuable contribution to the department's performance".

1.2 Coaching

Coaching can be seen as a process of providing information, including feedback, to an employee.

The purpose of coaching is to reinforce and extend knowledge and skills developed through other training.

The principles of coaching are:

- ✓ **Involvement**

- ✓ **Understanding**
- ✓ **Listening**

1.2.1 Changing the situation

The manager may:

- Change their behaviour patterns or style of leadership, to better suit the employee under consideration. Some staff prefer a democratic leader, and many prefer the definitiveness of an autocrat
- Change the conditions of the work situation – altering the workplace so it is more conducive to work by making it safer, making it less noisy or smoky, adjusting the lighting, air conditioning, introducing security staff.

2. Advising management on staffing needs

Managers will, from time-to-time, be required to provide input to others in relation to various establishment needs, plans and policies. Because labor is such a large budget figure, staffing requirements is a constant area where operational managers are called on to provide information to higher level management. An important part of your role as manager is to make sure the staff who report to you are engaged in interesting and meaningful work, they are fully occupied but not overloaded, and they have clear tasks to perform. In doing the work of a manager you will find you have more cooperation and interest from staff if you involve them and consider their suggestions for change or improvement.

As the manager of your team, you are in the best position to monitor staff needs and, where possible to meet these within the goals of your organization. Senior management of your organization will assume you are coping with the staff and resources you have unless you advise them differently.

Part of your role is to keep management informed of progress against goals and to advise them of any difficulties you are having with staff, patrons, equipment, suppliers, or authorities. In addition discussions may focus on any needs you are unable to meet including targets, budgets or deadlines.

At times you will find you are not always able to ensure there is a smooth and trouble-free workflow from your unit or department. There can be many reasons for this and it is usual your employer will be aware of them. Very few, if any, employers expect relatively new and young managers to run their department or unit without any problems. The vast majority are very understanding and more than willing to help where required and when asked.

Information 6	Providing input of appropriate management regarding staffing needs

1. How to Determine Staffing Needs

As a small business owner or startup founder, you may have a hard time figuring out your staffing needs. Being short staffed can keep your business from growing and make it difficult to handle the workload. Having too many employees, on the other hand, can drive up your costs and become a financial burden.

1.1 Develop a Staffing Plan

The first thing you need to do is to **develop a staffing plan**. Think of it as a map that outlines the exact number of positions and roles within your organization as well as the skills and qualifications required for each role. This document should **cover your current and future staffing needs** in accordance with your budget and goals. A small business staffing plan may include the following:

- The number and types of employees needed to run the business efficiently.
- Existing staffing resources.
- Staffing projections.
- Gaps in your workforce.
- Staffing options (such as permanent vs. temporary employees).
- There are various ways to create a staffing plan. For example, you may include your short- and long-term goals, the tasks needed to achieve those goals and who will be responsible for each task. Even if you're fully staffed, your employees may lack certain skills needed for upcoming projects. Therefore, it's important to look at the big picture and **develop staffing projections** for the next few months or years.
- **Assess existing staffing resources** and seek ways to maximize them. Use staffing forecasting methods to predict your company's future needs and identify any gaps when hiring new employees. A brick-and-mortar store, for example, can determine future staffing requirements based on the sales volume per employee over the past few years. Check each department in your organization and try to figure out where gaps exist.

1.2 Determine Staffing Needs

- As you see, there are several factors you need to consider when creating a staffing plan. Look at your business plan and existing HR resources. Create a **current skills inventory** and talk to your staff members about what other skills and abilities they may have. Check past performance reviews as well.
- Next, evaluate your options. Will your company need to hire more people? Is there any way to improve employees' productivity or help them develop the skills they already have? Do you need new employees in-house or on a project/contract basis?
- Check your **regular turnover and retirement turnover rates**. For example, if you know that several key employees will retire over the next two years, plan your staffing needs and budget accordingly. Consider hiring and training interns to cut costs. By the time your current employees will retire, interns will have acquired the skills and experience needed to replace them.

1.3 The Importance of Strategic Staffing

- Your employees are your greatest asset. A strategic staffing plan can increase your chances of finding the right people for the job and reduce your hiring costs. Additionally, it can make your business more productive and maintain harmony in the organization. Both under- and over-staffing can result in workplace conflicts, diminished productivity and revenue loss.
- With a staffing plan in place, you'll have a better understanding of your company's current and future needs. At the same time, you'll be able to **make better hiring decisions and reduce your turnover rates**. Furthermore, you can use a staffing plan to determine whether you need to bring in full-time, part-time or temporary workers. Update this plan as your needs change.
- A strategic approach to hiring also ensures that your business complies with equal employment opportunities (EEO) regulations. These laws apply to companies with at least 15 employees. **Organizational diversity** isn't just a legal requirement. It can also improve your company's reputation, increase employee engagement and grow your talent pool.

3.1 Staffing

Staff, or personnel, planning are one of the most common activities conducted by HR departments, according to an article on AllBusiness.com. It typically is comprised of using the current staff size and design to predict staffing levels for the upcoming year. HR departments may utilize a company's strategic plan as a resource for information. For example, if an organization intends to launch a new interactive website in the following year, the HR department will budget for additional staff to build and maintain the website.

3.2 Training and Development

HR departments create training and employee development plans as well. This type of planning must be conducted in advance of the company's needs in order to prepare for them, both from financial and resource perspectives. Training for new employees and product rollouts may be included. Teaching current employees new skills is considered an aspect of development. Organizations benefit from having streamlined and consistent training programs.

3.3 Career Development

Career development is imperative in order to prepare an organization for upcoming retirements, as well as to retain long-term employees. Companies need to have a strategic plan on how they intend to replace their management with qualified leaders. This means that current employees should have career road maps and plans that incorporate both short-term and long-term goals. For example, if an organization is grooming a top, young salesperson for the management track in five years, training should begin now. This may include time management courses, classes on how to coach others and a mentor program.

1.4 Downsizings

When companies foresee an upcoming need to downsize, it's in their best interest to have their HR departments plan for it in advance to ensure that the process is smooth and orderly, and complies with all legal requirements. This type of planning also may prevent loss of knowledge and resources. Some companies begin the downsizing process by eliminating non-essential personnel. Others lay off administrative staff, but keep money-generating positions. Organizations may be hit by lawsuits and high unemployment costs if downsizing is not strategically planned.

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Mechanics

Level-III

Learning Guide-42

Unit of Competence: Monitor Implementation of Work Plan/Activities

Module Title: Monitoring Implementation of Work Plan/Activities

Module Code: XX

LG Code: XX

TTLM Code: XX

LO 3: Maintain workplace records

Instruction Sheet	Learning Guide #42

This learning guide is developed to provide you the necessary information regarding the following **content coverage** and topics:

- Completing and submitting workplace records within required timeframes
- Delegating and monitoring appropriate completion of records prior to submission

This guide will also assist you to attain the learning outcome stated in the cover page. Specifically, **upon completion of this Learning Guide, you will be able to**:

- Recording Workplace accurately completed and submitted within required timeframes.
- Where appropriate completion of records is delegated and monitored prior to submission.

Learning Instructions:

1. Read the specific objectives of this Learning Guide.
2. Follow the instructions described below 3 to 3.
3. Read the information written in the information "Sheet 1and Sheet 2,

Information 1	Completing and submitting workplace records within required timeframes

1.Introduction

Workplace records are an important part of any work environment and should be accurately maintained within the required timeframes.

There can be severe legal and financial implications if records are not kept as required, are inaccurate, are incomplete and/or are not kept up-to-date.

1.1 Types of workplace records

Records in the hospitality industry can include:

- Staff records
- Performance reports
- Fire safety checks
- OHS inspections, risk assessments, and reports
- Security records
- Incident register
- Gaming incidents register
- Customer comments and feedback forms
- Orders
- Receipt of goods documentation
- Accident and illness register
- Injury claims
- Insurance claims
- Lease agreements and renewals
- Banking details
- Linen cleaning records
- Equipment maintenance records
- Subcontracting agreements and compliance documentation.

1.2 Types of staff records

These are records relating to any and all aspects of staffing the premises, and may be divided into overall records and individual staff records. Overall records are those records kept that relate to staff as a whole. They are important planning tools and allow a manager to gain an overview of what is happening with staff movements and training.

They include the following:

- Staffing rosters
- Training details by operational area
- Salary and overtime payments
- Injury records.

Individual staff records relate to individual staff and can include the following:

- Position description
- Letter of appointment
- Signed employment contract or offer of employment
- Performance review records
- Copies of certificates held by the employee
- Leave records – such as annual leave, sick leave and Maternity or paternity leave
- Record of uniform orders
- Training schedule
- Direct salary deduction details
- Injury claims.

Check with your employer to determine which of the above you are responsible for and if you are required to complete any other records.

When dealing with these records it is important to maintain confidentiality and to ensure the privacy of the information.

Also, there is a need to make sure the records are kept up-to-date or they become essentially useless and the records are kept in such a way that facilitates their easy access.

Managers are advised to investigate any individual establishment requirements relating to the keeping of records and to ensure they are observed

Information 2	Delegating and monitoring appropriate completion of records prior to submission

1. Introduction

In some cases there can be a need for you to delegate the completion of workplace records to other staff.

Where this need arises, the earlier notes on delegation must be implemented, and you have an obligation to monitor the performance of others in completing these records.

1.1 The essentials

The manager of a work area is unlikely to personally attend to all of the records in their work area.

But they are accountable for their accuracy. For this reason, a manager must be prepared to delegate such tasks and have a system for regularly monitoring such records.

Staff may be given required to complete records such as:

- ✓ Time sheets
- ✓ Requisitions
- ✓ Internal transfers
- ✓ Requests for maintenance
- ✓ Daily takings sheets.

  Delegating authority and responsibility for completion of such records involves: Finding the appropriate person to do the job
- ✓ Making sure the person is capable or trained to take on the task
- ✓ Ensuring confidentiality is maintained at all times
- ✓ Training the person in the tasks required
- ✓ Monitoring the process on a regular basis.

Monitoring may include:

- ✓ Regular visual inspection and checking of records
- ✓ Signing the records to authorize them or indicate they have been checked and approved
- ✓ Comparing the records kept with actual workplace occurrence – to ensure the records accurately reflect workplace practice and events.

It is a wise manager who defers delegating record keeping tasks until they themselves understand and appreciate all aspects of the job in question.

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Mechanics

Level-III

Learning Guide-43

Unit of Competence: Monitor Implementation of Work Plan/Activities

Module Title: Monitoring Implementation of Work Plan/Activities

Module Code: XXX

LG Code: XXX

TTLM Code: XXX

LO 4: Solve problems and make decisions

Instruction Sheet	Learning Guide #43

This learning guide is developed to provide you the necessary information regarding the following **content coverage** and topics:

- Identifying and considering workplace problems from
- Initiating short term actions of resolving immediate problem
- Analyzing problems long term impact
- Assessing potential solutions of consultation with relevant colleagues
- Encouraging participation of team members solving of raised problem
- Taking follow up action of monitoring effectiveness of solutions in the workplace

This guide will also assist you to attain the learning outcome stated in the cover page. Specifically, **upon completion of this Learning Guide, you will be able to**:

- Workplace problems are promptly identified and considered from an operational and customer
  service perspective.
- Short term action is initiated to resolve the immediate problem where appropriate.
- Problems are analyzed for any long term impact and potential solutions are assessed and
  auctioned in consultation with relevant colleagues.
- Where problem is raised by a team member, they are encouraged to participate in solving the
  problem.
- Follow up action is taken to monitor the effectiveness of solutions in the workplace.

Learning Instructions:

1. Read the specific objectives of this Learning Guide.
2. Follow the instructions described below 3 to 3.
3. Read the information written in the information "Sheet 1, Sheet 2, Sheet 3, Sheet 4, Sheet 5 and Sheet 6".

Information 1	Identifying and considering workplace problems from operational and customer service perspective

1. Introduction

Problem solving and decision making are two key tasks of any manager.
The ability to deal quickly and effectively with workplace problems are standard ongoing requirements for any manager and will be a significant indicator of your effectiveness.

1.1Problems

The very nature of problems is that they are often unexpected and they seem to come at the worst of times, such as when you are busy, short staffed or dealing with another problem.

They can show up in many ways, for example, as:

- Complaints
- Poor staff performance
- Failing equipment
- Orders not being processed as required, within set timelines
- Stress
- Staff absenteeism
- Decreases in takings and patronage.

An experienced manager recognises dealing with these issues as they arise and before they fully develop is what makes good management.

1.2 Solutions

A solution to a problem has the best chance of succeeding if:

- It is made early on when the problem first surfaces
- It includes those who are directly involved, or the reasons for the decision are explained to those who are not directly involved. This is yet another example of the importance of communication throughout the department in an on-going and honest way
- It is clear and unambiguous
- It is in-line with stated organizational goals
- It aligns with organizational policies, vision, values etc
- All the implications of the decision have been thought through.

2. Programmed and non-programmed decisions

In the hospitality industry, like many others, decisions can be described as either "programmed" or "non-programmed" judgment decisions.

Programmed decisions are those decided beforehand in response to regular occurrences. For example, in a restaurant:

Problem	Programmed decision
Customer is kept waiting for a table for over 10 minutes	Complimentary drink or meal
Food or drink is spilled on a customer and the customer hasn't contributed to this in any way	Offer to pay for dry cleaning of garment; complimentary meal
Course is not to the customer's satisfaction	Offer of another course

Non-programmed decisions are those where the person responsible uses their judgement and discretion to make a decision within agreed boundaries or scope of authority. This may happen for a problem that has not come up before, where the circumstances are different or where there are other contributing factors. Making a judgment about what to do is made easier with experience, but there are some guidelines to help:

- Look at each situation carefully, considering its specific circumstances. Never rush into a decision and don't be pressured into making a rushed decision. Often, situations are not what they first appear to be
- Think of the implications of any decisions you make. For example, is it going to be seen as setting a precedent? Will it cost too much? Who will it affect? Is it legal or otherwise acceptable?
- Make sure you are authorized to make the decision. Do you need to check with someone else first? Do you need to refer the decision on to someone else?
- Ask yourself as objectively as possible, whether the decision is fair and justifiable?
- Check whether the decision fits with organizational objectives and mission
- Remember, there is often more than one acceptable solution to a problem. Spend a bit of extra time looking for second and third alternative as opposed to the one you initially think of.

3. Steps in problem solving

The main steps in problem solving are:

Identifying the problem- Often a problem will be obvious to all concerned. But sometimes it is not easy to work out what the problem is. All that is known is there are a complaint, results not achieved or staff seem to be unhappy. It is important to take time to thoroughly investigate what the problem or issue is before taking any action.

Problem identification can be done by:

- Looking at the facts
- Talking with people and listening to their views
- Walking around the premises and observing
- Isolating some factors.

Remember, there can often be more than one problem that is causing difficulties. Sometimes a real problem can be „hidden" behind a less serious issue. You have to be sure you are treating the cause and not the symptom.

4. Considering options

Once the problem has been identified you need to:

- Identify your desired outcomes.
  For example, if you decide the problem is one of staff absenteeism through low morale, then your desired outcome will be to reduce the level of absenteeism to a level you specify and to increase morale.
- Also consider outcomes from an operational and a customer service perspective.
  Look at what alternative options you have for solving the problem.
  Sometimes there will only be one real option, whilst at other times there are a variety of options to pick from.

Options can be canvassed by:

- Meeting with staff to jointly come up with a solution
- Researching options
- Seeking expert advice
- Speaking to your supervisor
- Evaluating the alternatives and selecting the most suitable option.

1. Introduction

Actions taken within an operation workplace context can be seen as either short term action or long term action.

Where service is paramount, such as in the hospitality industry, it is sometimes necessary to take short term action to solve a problem until it can be looked at more closely and the problem dealt with more thoroughly.

1.1 Reasons for short-term action

Reasons for this include:

- Pressure of work often means there just isn"t time to stop and analyse the problem more carefully and in more detail
- To provide the necessary or expected services to the customer
- To meet OHS requirements
- To deal with a complaint
- To get staff working together again
- To give you time to analyze and work through the problem at a later date.

Usually these stop-gap measures are not satisfactory in the long term as they are often more costly and they do not prevent the problem from recurring.

As the manager of an area, it is important you consciously decide when to take short term action and when this would be inappropriate. If you decide to take the short term approach, then it is a good idea to:

- Make a definite time to look at it more thoroughly later on and to decide who to involve in further problem solving
- Inform staff and management it is a short term solution which will be dealt with more thoroughly at a specified time
- Cost the implications of tackling the problem this way.

1.2 Need for long-term action

Employers expect managers to analyze problems for any long-term impact so appropriate solutions can be devised.

Involvement of staff and other managers in the consideration is regarded as optimising the effectiveness of solutions generated.

Whilst short term action is useful, or essential, for getting through the day-to-day activities of an organization, managers must take also responsibility for long term planning especially where there are regular repeated instances of „emergencies‟ or situations cropping up.

If a situation is a one-off event, then the need for long term planning is non-existent, but where something happens again and again, it is worthy of consideration.

- ✓ How often is regular?
- ✓ When does something fall into the category of requiring long term planning?
- ✓ In the majority of cases it will become obvious, because:
- ✓ The situation is causing problems for staff and for customers
- ✓ Staff or customers are becoming annoyed or upset by it
- ✓ It is adversely affecting staff performance and customer service levels
- ✓ It is costing the company money
- ✓ It is involving and negatively impacting on a lot of people
- ✓ It is presenting an obvious risk of some sort
- ✓ It is breaching legislation, company policies and organisational values.

Information 3	Analyzing problems long term impact

1. Analyzing Problems and Goals

1.1 Justify **the choice of the priority problem or goal to be addressed. Include:**

a. How often does the problem occur (or is the goal attained)?
b. How many people are affected?
c. For what amount of time are they affected?
d. How severe (significant) is the effect?
e. How important is the problem or goal perceived to be by others?
f. How effective are efforts to address it likely to be?

1.2. Frame **the problem or goal to be addressed.** State as:

a. Lack of/too few of a POSITIVE condition (e.g., more youth should graduate from high school; all should be safe in their neighborhoods) or
b. Presence of/too much of a NEGATIVE condition (e.g., too many children drop out of high school; there is too much violence) or
c. Both (if different stakeholders seem to respond to different framing)

1.3. Review **the naming and framing of the problem or goal.**

a. Does the statement of the issue focus on the condition or outcome of interest? (e.g., improving school success and/or decreasing dropouts; improving safety and/or decreasing violence)?
b. Does it avoid defining the problem in terms of a preferred solution?
c. Is the problem or goal framed in a way to build consensus?

1. **4.Ask questions about the problem or goal to identify key behaviors, actors, and consequences.**

a. What behaviors (of whom) contribute to the problem or goal? (Who is doing -- or not doing -- things that contribute to the problem or goal?)
   i. Whose behavior needs to change? To address the immediate problem? To change the conditions that contribute to the problem or goal?
   ii. Which specific behaviors need to change in what specific people?

iii. How does this identification of target behaviors influence how we would address the problem or goal?

b. Who is affected by the problem or goal?

i. What types of people are affected? (e.g., children, parents, neighbors, service providers)
ii. How many people are affected?

c. How are people affected by the problem or goal?

i. What are the consequences of the problem (achieving the goal) for those affected?
ii. How often does the problem occur?
iii. For what amount of time are people affected?
iv. How severe (socially significant) are the effects?
v. How important is the problem or goal perceived to be? By community members? By outside experts?

d. When and where did the condition or problem behavior first occur, or when did it become significant?

i. Is the problem new or old? Is it increasing or decreasing?
ii. Where is it prevalent (in what places or groups)? Why?

1.5.Analyze "root" causes of the problem to identify the environmental conditions and related behaviors that might contribute to the problem or goal.

a. State the issue or problem (e.g., "Too many kids are dropping out of school"; "Too few young children receive quality care")
b. Ask "But, why?"
c. For each answer given, repeat the question, "But, why?"
d. Based on the answers to the "But, why?" questions, identify environmental conditions and related behaviors that need to change.
e. Based on the analysis, identify promising interventions that might contribute to improvement.

1.6. Identify restraining and driving forces that affect the problem or goal. (Conduct a "Force Field Analysis.")

a. What forces are keeping the situation the same?
b. What forces are causing it to change?
c. Indicate how this analysis influences how we would address the problem or goal.

1.7. Find relationships between the community's problems and goals.

a. State your priority problem(s) and/or goal(s) and how they may be linked to other related issues.
b. Draw a map or diagram of possible links between the priority problem(s) and/or goal(s) and other related issues. Use arrows (pointing one or both directions) to show how these issues may be related to each other.

1.8. Identify personal factors that may contribute to the problem or goal. How do each of these factors contribute to the problem or goal within your community?

a. Knowledge and skill
    i. Knowledge
    ii. Beliefs
    iii. Skills
    iv. Education
b. Experience and custom
    i. Experience
    ii. Cultural norms and practices
    iii. Social status
c. Biology and genetics
    a. Type and degree of existing health
    b. Cognitive, mental, or physical disability
    c. Chronic illness
    d. Gender and age
    e. Genetic predisposition

1.8. Identify environmental factors that may contribute to the problem/goal. How do each of these factors contribute to the problem or goal within your community?

a. Support and services
    i. Availability and continuity of social support and ties
    ii. Availability of appropriate services
    iii. Availability of resources
b. Access, barriers, and opportunities
    i. Physical access and barriers
    ii. Communication access and barriers
    iii. Competing requirements for participation
c. Consequences of efforts
    i. Social approval and disapproval
    ii. Incentives and disincentives
    iii. Time costs and delays
d. Policies and living conditions
    i. Policies
    ii. Financial barriers and resources
    iii. Exposure to hazards
    iv. Living conditions
    V. Poverty and disparities in social status

Information 4	**Assessing potential solutions of consultation with relevant colleagues**

1. Six's Tips to Assess Problems, Find Solutions

There's an old joke that a consultant is someone who listens to the employees, tells management what they are saying and takes a fee for it. This is truer than most consultants would like to admit. If you want to solve a problem without paying a big consulting fee, learn to do three things:

- Listen to yourself
- Listen to your team
- Do what makes sense

Yes, it's really that simple--90 percent of advanced tools like process reengineering, project management and quality management are just common sense. My mom once asked me what I did for a living. When I explained it to her, she said, "but that's just common sense." I replied, "It's because you call it common sense that I'm so good at it." Good old mom!

The Common Sense Approach

1.1. Fix what you can, instead of blaming others. Sure the economy sucks, suppliers mess up, and customers are a royal pain. That is as true for your competitors as it is for you. What makes winners different is what we do about the problems we can solve, and how we inspire our team to take a can-do attitude and do good work.

1.2. Fix the right problem. Think like a doctor. You wouldn't be happy if your doctor gave you stomach medicine for a heart condition. In business, though, we often fix the wrong problem. For example, when sales are low, we push the salespeople. Most likely, they're already doing a good job, and the problem is in marketing. Remember: The cause of a problem is almost never where the symptom shows up. Find the cause and fix it; you can't fix a symptom.

1.3. If the problem comes back, find out why, and fix it. Say you have some defective parts in your products. Getting rid of them isn't enough. How do you know more defects won't arrive with the next order? Instead:

- **Check with your supplier:** How can they confirm that there will be no future defects?

- **Change your contract:** Add a penalty for defective parts.
- **Change the way you choose suppliers:** Go for quality, and prevent the problem.

Now that you know how to fix problems, you just need to find the problems that need fixing.

1.4. Find problems by complaining. I recommend complaining. There's a great technique for finding your problems--and blowing off some stress--from Barbara Sher's book WishCraft. She calls it the power of negative thinking. Stand in front of a friend and deliver a standup comedy routine titled What's Wrong With My Business? Complain about everything. Be specific. Rant, rave and get it out of your system. Have your friend write down every complaint. There's your list of problems. Now start solving them.

Which problem do you solve first? It doesn't matter. If you have time and energy, fix the one that will be the biggest boost to your bottom line. If you're running around like a chicken with your head cut off, then fix the one that is bugging you the most.

1.5. Listen to your team. Go to your team, and tell them you want to make a fresh start. Tell them you want them to enjoy their jobs more and get more done. Ask each person on the team for three problems that you can fix to make their lives easier. If you haven't done this before, it may take a while before they take you seriously, but you'll get there. And when you do, you'll find that after you help them, they'll be ready to help you.

1.6. Your business works best once you've fixed the pipes. Be the plumber for your business. When you fix all big leaks, things start to flow. When you fix all the small problems, profits shoot through the roof. What flows in a business? Products, services, and solutions flow to your customers and money flows to you.

I hope you're not in business just to make money. The purpose of a business should be to do what we love, love what we do, make our customers happier and better off, and the world a better place. But money is the measure of a business. Track money--gross revenue, expenses and net revenue--to find what is working, and what is not.

Information 5	Encouraging participation of team members solving of raised problem

1. Introduction

While managers should encourage and motivate staff to solve their own problems and take responsibility for implementing them, there will always be times when they come to you with a problem.

An effective response to these situations is to continue the theme of involvement and actively engage staff in helping to identify a solution.

1.1Dealing with problems raised by a team member

Throughout your working week, problems brought to you by staff will cover a range of issues.

They may relate to operational matters: "The toilets are blocked and I‟m too busy to deal with it", customer service difficulties "That man is drunk and I‟m having problems dealing with him" or staffing matters "I seem to be doing most of the work whilst other staff just aren‟t pulling their weight".

One way to deal with problems raised by a team member is to make a decision and „solve‟ the problem yourself.

This is often necessary if:

- The problem involves calling in others staff
- Things are flat out and you need to make a decision to keep things moving
- Staff do not have the authority or the ability to solve it themselves
- Where the matter involves matters of confidentiality, security or health and safety.

However, where possible it is advisable to get the staff member involved in solving the problem themselves, with your support.

Techniques to facilitate this include:

- Asking them to fully describe the details of the situation
- Asking them what they have already done to try to resolve the situation
- Asking them why they believe their actions to-date have not been successful
- Asking them what they think the next step should be and why that is the case
- Contributing ideas to extend and support their ideas and suggestions
- Encouraging them to think of more alternatives

- Providing your thoughts on resolving the situation including the reasons why you believe your ideas might work
- Encouraging them to implement an identified possible solution.
- The key to this approach is to build their ability to make better decisions and to gain the confidence and experience to make those decisions.

Information 6	Taking follow up action of monitoring effectiveness of solutions in the workplace

1. Introduction

whatever solutions are arrived at, whatever resolutions are made in the workplace, it is essential to track the progress of those decisions to monitor their outcome and their effectiveness. While it is expected decisions and actions will fix problems the reality is this is not always the case and managers are expected to follow-up to ensure the workplace operates as effectively and efficiently as possible.

1.1Timing

Usually a time for monitoring or reviewing progress is made at the same time the decision is taken.

This time and date is diarized electronic or paper-based diary with a meeting sometimes held with relevant stakeholders.

This meeting simply seeks to determine whether or not the recommended action has been implemented is working as anticipated.

Sometimes the need for follow up action is notified by computer which flags when a certain item requires attention. This can occur when a pre-specified level is met. This level may be a certain
number, a set percentage, a nominated amount of sales, a given dollar amount or percentage over or below budget.

The computer may also generate a report or create some form of
warning to notify you attention is required.

The meeting should not be seen as a witch hunt, or as an opportunity to start laying the blame at anyone‟s feet if things are not progressing smoothly.

The intent is simply to verify things are on track, or to identify if and where they are not. Where things are not proceeding as planned, this session is doing its job. It is highlighting something needs more attention.

Managers should note the need for follow up action can be delegated to someone else. Where the review shows things are on track, and proceeding as expected, you may well decide to feed this positive information back to those who helped make the decision. It is always useful to be able to pass on some good news wherever possible.

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