

Case Study of Work and Work Force Management

20 Complete case study on different scenarios

Contents

Case Study of Work and Work Force Management.....	1
1. Understanding Management.....	2
2. Managing Workloads	2
3. GATHERING INFORMATION	2
4. EVALUATING OPTIONS AND MAKING DECISIONS.....	3
5. MANAGING STOCK	3
6. MAKING MEETINGS SUCCESSFUL	3
7. GAINING PARTICIPATION	3
8. UNDERSTANDING LEADERSHIP	4
9. MOTIVATING OTHERS	4
10. SETTING OBJECTIVES	4
11. DEFINING WHO AND WHAT YOU WANT	4
12. INDUCTING NEW EMPLOYEES.....	5
13. TRAINING PEOPLE.....	5
14. APPRAISING STAFF	5
15. DEALING WITH PERFORMANCE PROBLEMS	5
16. UNDERSTANDING CUSTOMERS AND SERVICE	5
17. DEALING WITH PEOPLE BY TELEPHONE.....	6
18. HANDLING COMPLAINTS.....	6
19. HANDLING CHANGE	6
20. MANAGING RESISTANCE TO CHANGE	6

1. Understanding Management

CASE STUDIES – AN INTRODUCTION

Let us introduce you to three managers whom you will be looking at in the following chapters. Each is different, and has gained their present position via a different route. We will observe how they handle a variety of situations.

Bev Hall, Shift Manager

Bev Hall is in her late forties, and has worked at the same nursing home on the south coast for twelve years. Before that, she worked in other similar homes for the elderly. She has never received any management or supervisory training, but because of her age and experience, has always been looked to for advice by other staff. A year ago, a new Matron made changes to the organisation of the home, and Bev was made Shift Manager. She now has management responsibility for twelve Care Assistants, two Domestic staff, plus a Cook. She feels that these resent her new position, and does not like having an office to work in, rather than being 'out and about'.

Nikki Coates, Office Manager

Nikki Coates is twenty-two, and recently gained an internal promotion to the busy head office of a large retail company. She is friendly, and seems to 'get on' well with her staff of five, but sometimes worries as to whether she is managing the office as well as it could be managed. Her predecessor had a management qualification, and although Nikki has a qualification in Administration, she feels it did not prepare her for dealing with the day-to-day difficulties of managing a hectic office.

Mike Summers, Corporate Accounting Manager

Mike Summers is a graduate. Having gained his university degree in Accountancy, he gained his first job as manager of a four-strong Corporate Accounts section of a local authority. Three of his staff are studying for their accountancy qualifications by day release or correspondence course, and he is aware that although he is better qualified, they know far more about the section and how it works than he does. He feels that he needs to take control of the team, and stamp his authority on it, if he is to be respected and taken seriously.

2. Managing Workloads

CASE STUDY

Bev learns that effectiveness is not the same as efficiency

Matron asks Bev to make out duty lists. These are lists of tasks that need to be done by the care assistants. Each list is to be copied and given out at the beginning of the shift, and people will sign it to say they have completed tasks. Bev does this, and the lists are signed each day. After a week, Matron carries out an inspection. 'Bev, the home is disgraceful!' she says. 'Standards have never been so bad – whatever is going wrong? You'll have to make sure things improve. I'll inspect again in two days time, and things had better be up to scratch.' Bev was horrified – she had standard lists of tasks to be done each day, which people signed to say all tasks were completed. However, focusing on tasks to be done on a day-to-day basis meant that tasks weren't being prioritised. She could have concentrated more on *how* things were being done and less on *whether* they were being done at all. Ticks in boxes don't mean things are done properly, or that the most important things are given sufficient time and attention.

3. GATHERING INFORMATION

CASE STUDY

Mike fails to check the quality of information

Mike has a problem tracking down the reason why some figures are not as expected, and asks everyone what they think. Rachel says, 'I don't know. Usually things like that are down to the manager in that department making a mistake.' Tom says, 'Last time it was computer error.' Jo says she will have a look and see what she can come up with, and Sam says, 'Hold on a minute, I think I can remember someone telephoning about this – I think the budget was amended.' Mike writes a stern memo to the budget manager, asking him to come up with an explanation. The next thing he knows, the man is on the telephone in a temper. Apparently, the computer has entered some items in the wrong categories, and he's been unable to undo the error. Mike should have remembered to check the quality of his information, to avoid embarrassment. Just because Sam's idea sounded factual, he

jumped at it, and didn't really investigate any of the alternatives. Had he researched, he would have found that the computer *was* making an error in this case.

4. EVALUATING OPTIONS AND MAKING DECISIONS

CASE STUDY

Nikki needs to be more creative

Nikki is asked to come up with a range of options for producing a new corporate booklet. She gives the job to Peter, who has worked on similar projects before, and he decides on a format. Nikki goes to her Senior management Team meeting and does a short presentation on the format, but no one likes it. She is sent away to come up with more ideas – several this time. Peter may have had experience, but using just one person's ideas isn't likely to lead to very creative ideas. Involving more people would have generated more ideas, and maybe Peter's idea could have been improved on. Had Nikki come up with a range of options as she was originally asked, and not just one, Peter's same idea might have been the best one, and might even have been accepted.

5. MANAGING STOCK

CASE STUDY

Bev fails to evaluate options

The care assistants are due to have new uniforms, and Matron asks Bev to choose the design. Bev gets the brochures, and asks everyone what they think. She takes a vote, and puts the first two choices to Matron. The first choice is too expensive, so Matron goes ahead and orders the second choice. When the new uniforms come, they are 'dry clean only', and can't be issued to staff. The exercise has to be done again, and this time Matron chooses. Bev feels very silly. Bev should have evaluated the options fully, not simply trusted people to choose sensibly. What she didn't do was to use factual criteria to evaluate the choices available. She could have included constraints, such as giving people a free choice but stipulating that choices had to be washable.

6. MAKING MEETINGS SUCCESSFUL

Mike's team meeting leaves the members dissatisfied

Mike goes to a team meeting for the first time. Just before the meeting begins, the chairperson calls him, to explain she can't make it. 'Can you chair for me?' she asks. 'I'd be really grateful, and I don't want to cancel it.' Mike agrees, and runs the meeting very efficiently. It takes about three quarters of an hour, compared with the usual two and a half hours, so Mike is very pleased with himself. Then on the way down the corridor, he overhears some colleagues. 'He's like Ghengis Khan! You can't get a word in edgeways, and he stamped all over us to rush things along. I shan't be coming to meetings any more if he's in charge!' Mike feels very embarrassed. Meetings don't just have to achieve the business, they also have to satisfy the members. Otherwise, they *feel* as if things haven't been achieved. Mike did rather railroad people to get things done, and clearly forgot that people make meetings work.

7. GAINING PARTICIPATION

Bev's staff meeting runs out of time

Bev holds a staff meeting with all her shift members. She has a number of items to discuss, and writes out a list as a formal agenda. When the meeting starts, people want to discuss some things in more detail than Bev had anticipated, and she has difficulty controlling things. Towards the end, time gets short and so the last things on the list are discussed hardly at all, and Bev doesn't get the responses she needs on them. Bev should have given the agenda to everyone so they could see how things were progressing. She should also have controlled things better, perhaps by introducing each topic and setting a time limit that was realistic. She could have pointed out what items were still to come before they actually ran out of time.

8. UNDERSTANDING LEADERSHIP

Bev worries about leadership

Bev is in charge of her people, but worries that she isn't a good leader. She feels leadership is being inspiring and looked up to. One day, she approaches Matron for advice, as she is thinking of some team leadership training. Matron laughs. 'The only person who doesn't think you're a good leader is you!' she jokes.

Bev needs to remember that good leadership often revolves around tasks, teamwork, and individuals. By looking after each of these, she is doing a good job, without being charismatic or stylish. She is doing exactly the right thing by seeking some extra training, to boost her skills and confidence.

9. MOTIVATING OTHERS

Nikki decides to try to motivate her staff

Nikki buys some books for the office, and takes photocopies of any relevant magazines articles to pass round. This way, she feels people are keeping up-to-date, so she gives them demanding work where she can, to give them a challenge and more responsibility. She even sets up a 'shadowing' programme, where they spend one day a week with another member of staff, learning about their job. Jacquie doesn't respond, and if anything seems less motivated than before. When Nikki asks what's wrong, Jacquie says, 'I don't feel part of all this Nikki. I don't want to take on more – I took this job because I liked it, and I liked the people I'd be working with. Now nobody has time to talk much any more.'

Nikki should remember that there is little point focusing on higher needs for motivation unless the lower needs have been satisfied. Jacquie is clearly motivated by social needs, and just wants to do her job well and work with people she likes. She isn't motivated by advancement or development at the moment, so offering these won't motivate her.

10.SETTING OBJECTIVES

Mike loses his leadership

Mike sets individual objectives monthly, and he allocates all the work to people as it comes in. Large tasks he tends to split into small sections, and give these to individuals. He has always tried to set work appropriate to people's skills and experience. One day, he notices that Rachel is doing work he had given to Tom. On further investigation, he discovers that this is happening all the time – people are re-allocating work behind his back so they can all do the tasks they like best.

Mike has lost control, as he has focused on the task and fragmenting it into subtasks. He has lost sight of the overall team and the advantages of working as one. Setting objectives is good, but he needs to be more specific so people know not to re-allocate work.

11.DEFINING WHO AND WHAT YOU WANT

CASE STUDY

Bev replaces Sarah the cook with June

Bev doesn't bother drawing up a person specification for a new cook to replace Sarah, thinking she has a pretty good idea of what she's looking for. At the interviews, June stands out as a good applicant, perhaps because she is quite similar to Sarah in a lot of ways. After a few weeks, however, it becomes apparent that June is a disaster. She is always taking time off (unlike Sarah), and her cooking is very limited in range. Bev should have been objective, and listed what she did want from the new person. That way, she would have recruited someone more suitable, not someone she liked.

12.INDUCTING NEW EMPLOYEES

CASE STUDY

Nikki's trainee annoys a senior manager

Nikki has a college trainee, Frances, to work in the office on a placement scheme for three months. As she will only be there for a short time, Nikki doesn't bother sending her on the company Induction course, but instead inducts her herself in things like fire exits, health and safety etc. A few weeks after the placement is over, a senior manager calls Nikki in to speak to him. 'Look at this!' he exclaims, waving a college report, 'Frances obviously has no idea how we're organised, and she's gone back and written up a college project on the company. She draws the conclusion we're structured wrongly, and work is duplicated, wasting time and money. The Managing Director is furious!'

Both Nikki and the manager know Frances has drawn the wrong conclusion. She didn't know there are some very good reasons for the structure, which produce massive savings and synergies elsewhere. However, as she hadn't been inducted, she had no idea about the structure or why it is that way. Nikki should send everyone on induction, even if they will only be there for a relatively short while.

13.TRAINING PEOPLE

Mike's training isn't effective

A new computer system is installed, so Mike arranges some training. Afterwards, only Rachel seems to have completely got the hang of it, so people go to her for help and advice. Eventually, there is a problem with the system, and errors come to light. Mike should have evaluated the training, to make sure it was effective. Even if he didn't, he should certainly have arranged some follow-up training when it became obvious that people weren't confident and capable using the new system. He should know you can't just send people on a course and expect them to learn.

14.APPRAISING STAFF

Nikki starts doing staff appraisals

Appraisals are a new to some people, and during them it is obvious to Nikki that people are focused on how they have done – the past. They are reluctant to discuss the future and their prospects. Nikki becomes quite frustrated. Nikki should remember that many people find appraisals frightening, and worry they are going to be told they haven't done a good job. She should speak to people before carrying them out, to reassure them and make it clear what is expected.

15.DEALING WITH PERFORMANCE PROBLEMS

Mike is seen as unfair

Mike establishes a gap in Tom's performance. He sets objectives, and waits to see an improvement. After a period of time, there is no noticeable change in Tom's work, and he hears that other staff are 'behind Tom', and think Mike has been unfair. Tom has obviously been discussing the situation with others. Of course, Mike can't stop Tom discussing matters. But if he had got Tom to accept the gap, things might have been different. If people don't accept there is a gap, natural reactions are to feel victimised and frustrated. Mike needs to spend time with Tom and show clear evidence that the gap exists.

16.UNDERSTANDING CUSTOMERS AND SERVICE

Nikki neglects her internal customers

Nikki receives a memo from marketing, and then the phone rings. A credit company is asking for financial information, and this is swiftly followed by a complaint from a customer. She deals with the complaint and credit company first. By the time she gets round to the marketing memo, she has already been given several messages chasing a response. By the time she responds, it is the following day, and marketing lose a big order because the customer decides to give their business to someone else.

Nikki needs to remember that internal customers are as important as external ones. She should have checked how urgent their query was – not just prioritised it as unimportant simply because it was internal.

17.DEALING WITH PEOPLE BY TELEPHONE

Bev deals with an angry relative

One morning, Sheila answers the phone. The sister of a resident is asking how she is. Sheila puts her on hold while she goes and finds Bev. By the time Bev gets to the phone, the caller is furious. 'I'm in a phone box!' she says, 'I'd have called back if I'd known how long it was going to be! As it was, I kept putting more money in, expecting someone to speak to me at any second!'

All Bev can do at this stage is apologise. Sheila should have asked whether the caller was happy to hold. Bev needs to train everyone in phone procedures – which are common sense to some people, but new to others.

18.HANDLING COMPLAINTS

Mike undermines his staff

Sam has a complaint about some information she has supplied to a manager in another department. She is unable to resolve it by phone, so the manager says he will take it up with Mike, her boss. She tells Mike what happened, and he promises to deal with it. When the manager arrives to see Mike, Sam again tries to help, but he will only deal with Mike. Mike agrees things will be put right, and apologises for the 'mistake'. When the other manager has gone, he says, 'Sorry Sam, I know you were in the right, but I needed to smooth things over, all right?'

'No it isn't!' snaps Sam, 'You made me look small and stupid! What's the point in my dealing with things if you just come and back down and give in to people, as if I was wrong in the first place?'

Mike should remember not to undermine his staff when dealing with complaints. Just because the customer is always right, he need not accept that his staff was in the wrong! When his staff are right, he needs to explain that they *are* right, but that he is going to sort things out to please the other person. That way, he doesn't undermine the status of other people.

19.HANDLING CHANGE

Mike's team suggests unnecessary changes

Mike is having a new computer system installed (again). He calls in the team and talks with them about it. They have a range of ideas, and people get very enthusiastic about the change. Mike takes the ideas to his own manager, who is less enthusiastic, 'These ideas are a little radical,' he says, 'Let's just stick with getting the system in, shall we?'

Mike understands this is an innovative change, but once people got enthusiastic, it started to become rather more radical and adventurous. People are wary of too much change at once, and Mike needs to remember this.

20.MANAGING RESISTANCE TO CHANGE

Nikki introduces a new way of handling accounts

Nikki and her team are told that the company has taken over a smaller company, and soon their accounts will be coming to Nikki's office in addition to their usual ones. Everyone can see it will be very difficult to cope with the extra figures and paperwork. Nikki tries to see how the workload can be accommodated. She decides to make each team member responsible for a stage in the process, which they will become practised in, and thus quicker. Excitedly, she realises that all their accounts can be handled this way, and explains the new system to the team. She is surprised when they all respond differently. Bill is enthusiastic, and sees an opportunity to specialise. Peter doesn't care – he just wants to get on with what he's told. Jacquie isn't happy, and makes a fuss but eventually gives in, whilst Lyn and David seem to be being deliberately awkward.

Nikki needs to remember that people react differently to change. She needs to allow for this, and consult and communicate with people whilst her ideas are taking shape, not just when she has made a final decision. That way, they will feel involved.