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<b>External information</b>
Information sourced and generated by a group or individual external to the organisation <b>Examples:</b> New WHS legislation, industry news, stationery price list
<b>Active information</b>
Used frequently <b>Examples:</b> User manual, procedural documents
<b>Inactive information</b>
Used infrequently <b>Examples:</b> Archived historical sales data, industry profile
<b>Formal information</b>
Recorded for use as a reference or communication tool <b>Examples:</b> Emails, memos, reports, files
<b>Informal information</b>
Recorded for use as a reference or communication tool <b>Examples:</b> Emails, memos, reports, files

## Implement workplace information system

The writer Gertrude Stein said, ‘Everybody gets so much information all day long that they lose their common sense’. As the quote suggests, one of the biggest challenges facing people today is how to choose the information they need from the vast amount that is available. People and organisations now compete for business in what is known as the information age, where the production and supply of information is becoming a more valuable commodity than physical products.

The challenge for managers and their teams is to handle and use the information available to them in an effective way. They must understand what information is needed in different situations and implement systems that enable information to be accessed, used, analysed and reported on in ways that help teams and organisations meet their goals.

All organisations receive and distribute a large amount of information every day via various information management systems. This information takes many forms, is useful in a variety of circumstances and is aimed at different audiences. It can be routinely generated or produced on a one-off basis. It can circulate via written documents, in face-to-face or telephone discussions, or through electronic tools such as the internet.



## Decide information needs

Information helps organisations meet and exceed their corporate goals by helping them deliver better products and services to their customers. Regardless of the type of industry, product, service, customer or organisation, information is needed for teams within organisations to function effectively. The more accessible and high-quality the information is, the more you and your team will be able to serve your customers and perform the operational tasks necessary for your broader goals. Examples of the importance of accessible and high quality information are illustrated below.

### Customer service

Imagine a call centre trying to solve a billing problem without access to a customer's records and account, or a purchasing department unable to tell you the price of new computer equipment for your team, or a manager who cannot tell a sales team whether they are on track to make their sales targets. Without information, your ability to provide effective service and undertake even the simplest tasks your position requires is greatly decreased.

### Obligations and responsibilities

Information is needed for organisations to fulfil obligations and responsibilities to their employees and customers, and to meet regulations issued by governing authorities. For instance, organisations need to keep a log of all work health and safety incidents for WorkCover inspectors and need to have a privacy policy available for both customers and employees. Corporate entities need to assemble information to lodge a tax return and gather and distribute information about their annual general meetings.

## Determine information needs

Different teams need different information depending on their day-to-day tasks. Some teams rely on receiving a great deal of financial data from internal computer systems; some collect and analyse information about competitor products and services; others use information contained in manuals and procedure documents; and most need a combination of information types.

### Total team needs

If you are reviewing your team's total information needs or setting up a workplace information system for your work unit, a suitable start is to conduct a review of your team's operational plan and structure. This involves looking at the team's goals and seeing how team members' roles connect with each other. You can review job descriptions, provide staff with surveys to complete and look at the team's expected outcomes. You need to ensure a complete list of all information requirements is created so that an effective information system can be established.

## Ideas for obtaining information

The possible solutions provided for the problems below might help you and your team overcome some common difficulties experienced in locating and accessing data.

Here are some problems with obtaining information and possible solutions.

### **You don't know where to locate a piece of information**

- Ask your manager.
- Ask staff in other departments.
- Ask subject experts or specialists in that area.
- Look through your company structure or directory – where do you think the information would most likely be held?
- Investigate whether the information actually exists or whether it is available in a different form to your specific requirements.
- Ask a professional researcher such as the workplace librarian or consult a professional association or resource centre in your industry.
- Reassess how important the information might be in helping you resolve your problem or complete your activity.

### **Information is not where you thought it would be**

- Ask the person you thought had the information if they can suggest an alternative location.
- Ask specialist staff in other departments, or others who you think may use the information you are looking for.

### **You are concerned about getting the information on time**

- Be clear and concise when requesting information and make sure the individual who receives your request completely understands what you need.
- Ensure the information deadline is communicated and understood.
- Find out whether there are ways to process the information faster; for example, by incurring a fee or completing additional approvals or paperwork.
- Find out how long it will take to get the data when you lodge a request and, if necessary, plan other activities around this.
- Formalise your request in writing and follow up with a phone call confirming that the information will be available by the required date.
- Alert those who may be relying on the information you are collecting well in advance if you foresee any difficulties.

## Electronic and paper-based filing systems

Although a great deal of data is now found in electronic format in many organisations, paper-based filing systems are still used in place of or in support of the electronic systems. These filing systems can be team-based or centrally set up for the whole organisation. Remember that team members and colleagues may have valuable information in their own files, which they may be willing to lend you.



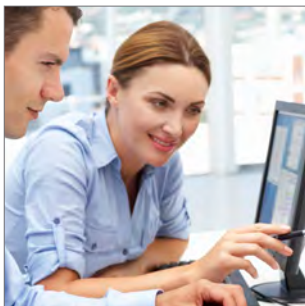
## Manage filing systems

Here are several tips for managing electronic and paper-based filing systems.

### Tips for managing filing systems



Make sure you and your team members are familiar where frequently used data is stored on your company's server or intranet. Ask your IT support staff to provide you with a map of what information is available and where it is located.



Ensure your team members are aware of protocols for saving information they create onto servers or how to upload information to an intranet site. If this process is undertaken by individual staff within your organisation, make sure you and your team fully understand the process and the file formats needed.



When you set up your own filing system, electronic or paper-based, take time to think about how the information should be categorised – by subject, issue, creator or date? There are many ways to set up filing systems – remember that the most important issue is being able to find the information you need quickly and simply. If your files are going to be accessed by a wide range of people, create a guide or reference system for them.

**Check frequency of updates**

For information you and your team use on a frequent basis, find out how often it is updated and when the update occurs. For instance, if you are compiling a report on the impact of new machinery on the defect rate within the production department, you'll need to know when the defect rate is measured and reported on so you can include the most up-to-date statistics in your report. Check the dates of any reports you or your team members refer to and highlight the fact that the information you are using to base decisions or recommendations on is current in reports or papers that you prepare.

## Consequences of using out-of-date information

Consequences of not using current information include making the wrong decision, giving false results, incurring financial loss or being subject to legal action.

Here are some examples of consequences of not using current information.

**Wrong decisions**

If you are making an important decision based on information you have collected, using out-of-date information might severely compromise the decision and affect the results of that decision.

**Financial loss**

Financial loss is another serious repercussion that can result from using the wrong information. What would the impact on your team be if you implemented your resource plan using a budget that was six months out of date and \$10,000 less than the current cost of acquiring the resources needed?

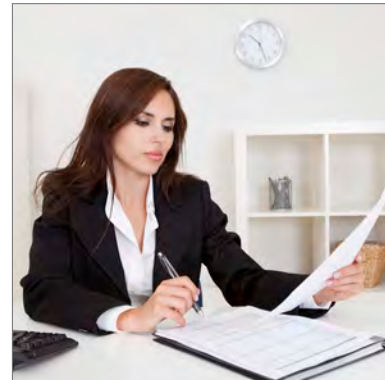
**Legal action**

A possible serious consequence of using dated or obsolete information is exposure to legal action. Employee legislation, such as awards and agreements, employee rights and WHS guidelines are constantly subject to change. If, for example, you were to dismiss an employee based on previous unfair dismissal laws, you may find that the law has changed significantly and the company may be subject to significant penalties.

## 2A

## Collect information on time

As information is gathered, you need to assemble it in a way that allows for analysis and review within your allotted time frame. For example, imagine you have been asked to present a report at next month's management meeting and make recommendations on the human resources requirements of your team for the following year. You'll have to ensure that you've identified and gathered sufficient information to prepare the report and make recommendations, and that you then have enough time to review the information, check to ensure it meets your information requirements, analyse the data and formulate your report.



### Ensure information is adequate and relevant

Ensuring that information collected is adequate and relevant can be achieved by reviewing the data as it is gathered and checking whether it will assist in completing the task or solving the problem. This involves reviewing information for suitability, accessibility, currency and reliability, as well as considering whether the data will help you complete the task you are working on, or whether additional information should be sought to supplement it.

If you are collecting information for your manager and are not sure if the material is appropriate, discuss the situation with them and clarify your purpose. Encourage team members to ask you as soon as they are in doubt about any aspects of their research. Clarify their concerns and repeat your requirements.



### Allocate time for each activity

You should organise your time according to the complexity of the project or activity you are working on. For basic information gathering, a brief memo or email requesting information by a certain time may be sufficient. For a lengthier project, you will need to prepare a detailed plan specifying the person responsible for collecting each piece of information you require and the time lines for collecting it.

A project plan or similar tool can be used to organise the tasks you need to successfully finish the activity you are working on in a timely manner. Here are some useful strategies.

#### Have a contingency plan

It is useful to have a contingency plan in place in case information is not received in time or your time line is approaching and you have not been able to work through the information. What will you do if time runs out? How will you ensure your information is collected in a timely manner, and still meets a certain standard?



## Be aware of audience diversity

When communicating information, consider that the people receiving the information will have different literacy skills. Literacy does not simply refer to a person's reading level or familiarity with English. It also refers to financial, mathematical and technological literacy. Also, physical disability may mean that some people are unable to analyse information presented in certain ways.

For example, people with hearing impairments may not be able to participate in team discussions or listen to verbal announcements. Others may have a disability that inhibits their ability to process information, or some may simply have a reduced reading ability or understanding of mathematics that means they can struggle to make sense of data.



## Modes of sharing information

Information can be disseminated in informal or formal ways. Consider who the recipients of the information will be and how they should receive data before deciding on an appropriate presentation.

Here are several common methods of information sharing.

### Hard copy

Circulating written information such as reports, memos or bulletins has become less popular; however, in many workplaces it is still an effective way to share information. Posting brief announcements or bulletins on noticeboards, writing a letter or short report and dropping copies into pigeonholes or circulating a single copy using a circulation slip are common and effective ways of sharing written information.

Written information can be more formal than other communication. Make sure that what you write is well planned, proofread by another person (if possible) and is clear and concise. The tone and style of the document should be appropriate to the content and nature of the information you're sharing. Pay particular attention to the needs of your audience – those receiving your documents will have different reading abilities.

### Email

Email can be a simple short note, or an attached report or other document. When sending information by email, think about who will receive it. Should you mark it as 'Important'? Does it need to be read in advance of a date or event (such as a meeting)? Do some people need to act on the information? Do others need it only for information purposes? If attaching a report, include a brief cover note explaining what the information is, what it relates to and what action or attention is needed by a particular time.

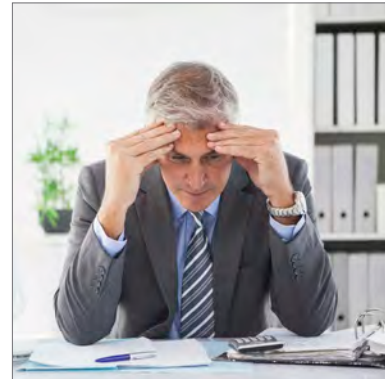
For many, using email has meant that discussion and face-to-face communication with team members or other colleagues has lessened. While email can be a very effective communication tool, it is not a replacement for interactive discussion.



## 2C

## Identify and report trends and developments

Once you have obtained relevant information, you need to analyse your material and edit it to meet the required purpose. Analysing is about fully understanding what the information means. You probably already started to interpret and analyse the information as you collected it. Early analysis may help to direct the later stages of your information collection or research more effectively. While there are some sophisticated ways to analyse information, particularly quantitative data, it is best to keep it simple where possible.



Whatever methods of data analysis you use, you must be sure the methods match your task objectives. There is no point converting all your data into attractive charts if your analysis does not answer the questions you set out to answer. Before you start the analysis, look back at the original purpose for collecting the information to refresh your understanding of central issues and key questions. What is it that you set out to achieve or what problem are you trying to solve? This will help you to focus your analysis on the intended objective.

### Undertake data analysis

Here are several hints for effectively analysing data.

#### What to do when undertaking data analysis

- Select the appropriate method for your purpose.
- Remember that your analysis is only as good as the data it is based on.
- Make sure your results can be easily understood, especially if you use complex analytical techniques.
- Try a mixture of methods.
- Keep referring back to your objectives to ensure your analysis is relevant.

### Steps to follow when analysing data

Here are five main steps to follow when analysing information.

1

Organise the information.

2

Decide the method of analysis.

## Confirm that the results meet your purpose

Once you and your team have analysed your information, you need to confirm that the results enable you to resolve the issue you're working on, meet team or organisation objectives and goals, answer the question you had, report on developments or activities, and identify trends and developments. Here are some ways that you can confirm that results are actually meeting your purpose.

### Compare goal against results

This can be done by comparing your original goal or purpose against the analysed information or results. Try asking yourself 'What does the analysed information tell me in relation to my original problem? What does this information enable me to do as the next step?'

Although this step is important, you must ensure that you keep an open mind when analysing data so that you don't influence your results by looking for certain trends or specific answers to your question or problem. Often people see what they want to see rather than the actual facts. You need to be as objective as possible when processing information into knowledge.

### Make assumptions

You will make assumptions about what the results mean. This part of the process allows you to develop conclusions and recommendations so others can learn from what you have discovered.

You can make sure your assumptions are valid by demonstrating the clear relationship between the data and your conclusions. You must also be able to justify your interpretation by explaining how you came to your conclusions, and your assumptions must fit in with your overall objectives. If your assumptions do not match your objectives, you have probably drifted away from your task's particular goals and you may need to refocus your research.

## Step 5: report the results

Now you must produce something meaningful to pass on. How can you share your findings with others?

You can complete your research by summarising what you have discovered, developing conclusions about what it means and making recommendations about what should happen next. Here are some tips for reporting results.

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## Topic 3

# Implement information systems

One of the duties of a manager is to work with their team to ensure that organisation-wide information systems are implemented and used effectively within their own work unit. The objective of any information management system is to manage and deliver accurate, timely, accessible and useable information for the efficient operation of an organisation. Better information means teams are equipped to make better decisions, better serve their clients and develop better products, services and systems. As with any systems and processes, if there is an opportunity to improve the process, your suggestions need to be made to the appropriate people and be within organisational guidelines or policies.

In this topic you will learn how to:

- 3A Implement management information systems effectively for decision-making purposes
- 3B Use technology available in the work area to manage information
- 3C Recommend improvements to the information system

## Retrieve information

There is little point storing important information that cannot be retrieved or accessed later and used by the team or others who need it. Here are several retrieval methods.

Retrieving information
Set up protocols that support the consistent naming of hard-copy and electronic files.
Establish information retrieval needs (for example, who retrieves data, when and how) and develop access systems that facilitate and support these needs.
Review how frequently different sets or groups of information are accessed and make popular information more accessible.
Ensure that file naming and storage systems enable simple and rapid data access. For example, record file names, creation dates and short description on creation.
Inform team members of personnel responsible for restricted information.
Make sure team members understand and use search engines and key words effectively when searching the internet.

## Review information

Reviewing information refers to the regular review of data that is held in storage to ensure its reliability and currency as well as reviewing information during the analysis process. Here are some points to follow.

Reviewing information
Undertake activities that facilitate the understanding of information and the acquisition of knowledge.
Check information to make sure it is still relevant and useful.
Ensure that data storage and retrieval systems are still workable and useful.
Delete or archive information that is no longer relevant to organisation or team needs.
Regularly monitor and review the system as part of a continuous improvement cycle.

**Desktop publishing software**

Desktop publishing software enables organisations to produce professional documents and other visually oriented or design-based material such as advertisements, flyers, newsletters or other documents at low cost. Packages allow users to edit, layout and design any type of printed material intended for publication. Examples of desktop publishing programs include Adobe InDesign and Microsoft Publisher.

**Email software**

Emailing can be managed by software packages that are installed on individual or networked computers (an example includes Microsoft Outlook) or can be undertaken using web-based tools such as Yahoo! or Hotmail.

## Budgets and financial management systems

An efficient financial information management system is essential for entering data, monitoring performance and controlling expenditure. Make sure you are up to date with current systems and practices. Ensure your team is well trained by arranging courses, coaching or mentoring.

Here are several features of a financial management system.

**Computer hardware**

Computer hardware systems for accessing the internet and operating email, and other communication systems such as an intranet or extranet.

**Software**

Software that provides the necessary tools to undertake tasks including word processing, financial analysis using Microsoft Office Excel or other financial programs, development of electronic presentations and communication via an email package and web/Internet software.

**Specialised systems**

Specialised systems that are generally software based such as payroll and finance systems, including software such as MYOB, Attaché and Oracle, and sales and marketing tracking systems.

## Capture suggestions for improvement

You need to make sure you and your team has clear information and an understanding of any systems and processes in place that are designed to capture suggestions for improvement and facilitate change.

Information systems might involve:

- completing forms or templates
- preparing business cases
- offering alternatives to existing processes
- making notes and explaining the impact of the change occurring (or not occurring)
- asking staff for feedback on the recommendation and understanding how it can affect them and their teams
- seeking help or advice on the issue from specialist staff
- developing a method of measuring the existing process against the proposed process to evaluate effectiveness and contribution to goals.

## Make recommendations

Once you have collected the information, you will need to make a recommendation to management. Often the level of complexity involved in suggesting and then making a change will depend on the nature and structure of the organisation, how many staff and teams are impacted by the potential change, whether the organisation attains any quality standards and the nature of existing processes and how they are documented.

In a large organisation, you may need to submit a formal recommendation, including a business proposal covering the research data, the conclusions you have reached and a recommendation that includes options or alternatives.

In smaller organisations, a recommendation might be presented at a staff meeting. In most cases you will need to supply documentation that supports your recommendation, such as analysis of data, costings, information from primary sources, and so on.

Make sure all recommendations include:

- the current situation
- the reason for new resources
- your recommendation
- data to substantiate your recommendation
- costings
- alternatives if the recommendation is too costly or not available.

# 4A

## Collect information about future needs

As part of continuous improvement, managers need to make sure the information system continues to meet the needs of their team. This should involve a continuous cycle of reviewing, planning, implementing and monitoring.

Future needs may include:

- new software programs; for example, databases, desktop publishing software, project management program
- a better storage system
- quicker access time
- improved filing system
- improved communication systems
- technology support
- staff training.

### Resource planning for future needs

Resource planning for future needs can be done on a regular basis (for example, annually or quarterly) or can be conducted as needed. Many organisations expect teams to plan their resource needs at certain times during the financial year in line with budgeting and business planning activities. Other organisations rely on managers to prepare resource proposals as the need arises.

To identify what resources may be needed in the future in terms of the information management system, you need to consult with a range of people using diverse data collection methods. Make sure you consider people's language abilities, their background and experience when you are collecting information. You may need to reword a survey or explain more clearly what you want to know. Always confirm that the other person understands what you are asking.



### Seek information from colleagues

You will need information from a range of people in your organisation to confirm that you understand and identify what is needed in terms of changes to the existing information management system and supporting technologies. People will offer advice and information from different perspectives so you need to listen, make notes and analyse the data before making any decisions.



**Observation**

An effective way of gathering information is to watch how your team goes about its daily tasks. You may notice that certain functions such as research are taking too long, team members are unsure how to use a database efficiently, or information is not being circulated effectively. Make notes and follow up your observations.

**Planning days**

Some organisations hold specific planning days at which each team is expected to contribute information, ideas and suggestions from their team's perspective to be included in the organisation-wide business plan.

**Example: consult and collect information**

Lucy makes sure she uses a range of methods to consult with as many people as possible to collect information about her team's future needs.

Lucy obtained a number of suggestions at a recent team meeting and needs to formalise the ideas and itemise those that are needed urgently and those they may need in the future. Here is how Lucy consulted and collected information.

**Team meeting and brainstorming session**

She asked members to think about ideas and bring them to the meeting. At the meeting they had a brainstorming session. This revealed that the administrative team managed a lot of information, and all of it was stored in the small hanging files that were in team members' desks, on shelves above Lucy's own desk and in boxes on the floor.

**Consultation with resource management specialists**

Lucy spoke with the manager and team members of the accounts and design departments (the only two departments within the company that kept any kind of proper filing system) to see how they organised and managed information. Accounts had their own system that had been set up with their specific needs in mind.

**Research a workable filing system**

Jack, one of the team members, researched what would be needed for them to set up a workable filing system for the entire company. He spoke with various representatives from each department and recorded their ideas about the proposed new system. He also spoke with suppliers about costings.

*continued ...*

### Short-term budgets or plans

Short-term budgets or plans refer to the immediate future, usually up to 12 months in advance. They are more detailed than long-term plans and budgets because costs are known and operational funds have been allocated to the various activities defined in these documents. For example, more computers or filing cabinets, or increased staffing numbers.

### Operational plans

Operational plans describe in detail the activities and tasks teams and individuals within them will undertake in line with team and organisation goals and objectives. In terms of the information management system this means making sure that the team has the tools needed to meet the goals.

### Spreadsheet-based financial projections

Spreadsheets are powerful tools that allow managers and their teams to test different scenarios and 'what if' situations. They project future cashflows, incomes, expenditures and other current financial information into the future based on assumptions related to factors such as increases in costs, inflation rates or business expansion plans.

### Cashflow projections

Cashflow projections are estimates of future and likely flows of cash into and out of an organisation. They are useful in identifying times when cash reserves within a company may be low or, worse, if expenditure may exceed income. Such projections allow managers and their teams to plan expenditures over time so their impact on cashflow is not as great.

### Targets

Targets or key performance indicators (KPIs) for production, productivity, wastage, sales, income and expenditure identify goals that organisations or teams aim to achieve. Targets or KPIs enable managers to measure how well their team is tracking against budgeted amounts by measuring performance against indicators or targets at different intervals.

## Customer requirements

Other things to consider as you gather information include customer or supplier requirements. For example, you may have recently received a number of complaints from customers about the time it has taken to return their calls and incorrect contact details being used. Your team has advised you that the customer database urgently needs to be

## Expectations and standards required for proposal documents

If you are not sure what to include in your proposal and your organisation does not have a preferred style or standard, ask your manager what they expect to see and what kind of information needs to be included. Find out what level of detail is appropriate, how the document should be structured and its proper tone. You need to know what is needed and expected, and deliver on that. Try to collect some completed proposals from other departments or organisations.

The more in line with expectations and standards your document is, the less likely it is that you will encounter problems or have your proposal rejected. Eliminate as many variables or potential areas of concern as you can by researching what you need to provide and ensuring you have the information required to produce a high-quality proposal.

Even if you do have a template or framework to work with, ask for an example of a proposal.



## Reflect on a recent proposal

If you have submitted proposals previously, reflect on a recent resource proposal you or your manager has prepared. Ask yourself these questions to improve your skills.

Questions to ask when improving skills
Was the proposal accepted?
If so, why was it accepted?
If not, why was it unsuccessful?
What was the impact on my team or my manager's team?
How could the process have been managed better?

## Preparation of resource proposals

Here are some tips that will assist you when preparing resource proposals.

### Write clearly

Always write clearly. If you want to say something but don't know how, try writing it just as you would say it in conversation. If you are not a confident writer, consider attending a short course on business writing, consulting a book on the subject or asking someone you know who can write effective documents.

## Example: rely more on compromise than formally prepared documents

Bec is a speech therapist and team leader at a community-managed early intervention centre that has 12 staff.

Most requests for resources are made verbally by team leaders to a member of the management team. This works because it is a small organisation. Managers and team leaders can discuss what is needed and why, and then negotiate and compromise depending on what's available in the budget. Their job calls for them to complete a lot of documents and forms, so this way it is faster and involves less paperwork.

Even though the system is verbal, it is still closely monitored and budgets are detailed.

Requests for large items are usually treated differently because they often rely on additional funding to come from government agencies, charities or other external bodies. The only other resource documentation team leaders need to complete and submit to management is a one-page form for professional development expenditure for staff. The form is an electronic one and asks when the training is to take place, how much it will cost, who will be attending and why they feel it is important or beneficial for their own development – including how the new skills or knowledge they acquire will be relevant to the centre.



## Practice task 10

Answer the following questions in relation to your organisation or an organisation you are familiar with.

1. How does the organisation require managers to present resource proposals? For example, do they create their own document, have a discussion with their manager or use a template?

*continued ...*

#### Provide information

Be prepared with a written explanation of the change and what it involves. The complexity of this information will depend on the type of change. For example, the relatively simple introduction of a new communication system may only require a verbal discussion and a brief written notice.

#### Provide training

The type of training you chose will depend on the situation. There are many options. For example, staff might attend an in-house or external training session; you might appoint a coach or mentor; training might be once a week for a number of weeks until you are sure the new skills have been acquired, or there might be an intensive two- or three-day session.

#### Provide time

Most changes take time to implement, be accepted and become part of the organisation's operations. For example, staff may need training in new technologies then time to put their training into practice; they may need to adjust to using a new filing system.

## Provide opportunities to monitor the change

Managers need to provide support and encourage team members to:

- adapt to changing work environments
- provide feedback on issues
- openly discuss problems and concerns
- raise ideas and suggestions that could improve work practices
- assist in the implementation of new or updated processes.



## Methods for monitoring the change

All these things require effort, effective teamwork and enthusiasm – from the manager and those who they lead. How you go about monitoring the change will depend on the complexity of the change. Here are several methods that can assist you in monitoring change.

#### Informal discussion

Ask team members if the system is working and why.