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Step 4: Implement the operational plan

How are activities undertaken?
Everyone has a responsibility towards implementing the organisation’s plan. The role of a frontline manager is to help staff implement the parts of the plan that are relevant to their department or group.

Step 5: Reporting and reviewing progress

Did we achieve our goals?
Did the implementation work?
What do we need to do better?
The activities or tasks detailed in the plan are linked to outcomes, responsibilities, time lines and regular reviews that enable managers to decide whether the activity is being implemented successfully.

Resource requirements

To be an effective frontline manager, you must help achieve organisational goals and objectives. To do this, you must review the capacity of existing resources and pre-empt the resources required to complete projects, tasks or activities. Part of this process involves acquiring resources, establishing budgets and ensuring effective communication between all stakeholders. Resources are everything you need to implement the operational plan. Resource requirements may refer to:

- goods and services to be purchased or ordered
- human, physical and financial resources (both current and projected)
- stock requirements and requisitions.

The frontline manager must understand the organisation’s strategic goals, the needs of clients/customers, the budgets and the time lines before they can accurately outline resource requirements.

Allocate resources

Once you have identified steps and time lines, you are ready to allocate resources to the tasks. You must ensure your team can carry out their tasks efficiently and on time. You should also have some indication of the resources you need to allocate to each task.
Benefits of consultation

It may be helpful to consult with other managers and supervisors involved with, or affected by, the implementation of the operational plan. You may find some crossover in activities where resources can be shared. Other teams may have additional resources that can be seconded or loaned to you. You can also learn from someone else's experience and insight.

Finally, resource planning must be undertaken in consultation with your team. The chance of difficulties or areas of uncertainty arising will be considerably reduced if team members have been involved from the beginning. You may also find that a staff member is hoping to take holidays at a critical time or they feel that they don't have the experience or ability required to implement aspects of the plan. These are issues that you will need to take into account when allocating resources.

Example: coordination of volunteers

Since 1950, the Australian Red Cross has been conducting an annual door knock appeal called Red Cross Calling. This is a large project and as soon as one year’s appeal ends, the organisation only has a short time before it needs to start planning for the following year.

Perhaps the most complex and critical task is planning and organising the resources required for this nationwide appeal. Because the Red Cross is a not-for-profit organisation, the appeal is run on a very tight budget. All collectors are volunteers. Every year, the organisation has to make sure it has enough volunteers to cover the whole of Australia.

It also has to plan and organise other resources, including:

- a volunteer’s collection kit
- collection tins and signage
- permission from local councils and police to collect at intersections
- regular letters and communication to collectors to maintain momentum throughout the campaign.

The resource planning alone for this appeal is an enormous task. Managers need to liaise with Red Cross staff, volunteers and goods and service providers while working within a very tight budget. They also need to ensure they prepare a back-up plan for collections in case something goes wrong.
## Example: develop a training video

<table>
<thead>
<tr>
<th>Task</th>
<th>Who</th>
<th>Date</th>
<th>Time</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preparation of project plan</td>
<td>Hannah</td>
<td>28 Apr</td>
<td>4 hrs @ $46 ph</td>
<td>$184</td>
</tr>
<tr>
<td>Meeting with video company 1</td>
<td>Nila</td>
<td>29 Apr</td>
<td>1 hr @ $35 ph</td>
<td>$35</td>
</tr>
<tr>
<td>Meeting with video company 2</td>
<td>Nila</td>
<td>1 May</td>
<td>1 hr @ $35 ph</td>
<td>$35</td>
</tr>
<tr>
<td>Producing video</td>
<td>Video production company TBA</td>
<td></td>
<td></td>
<td>$27,000</td>
</tr>
<tr>
<td>Concept discussion</td>
<td>Hannah and video company</td>
<td>9 May</td>
<td>1 hr @ $46 ph</td>
<td>$46</td>
</tr>
<tr>
<td>Writing script</td>
<td>Lucas</td>
<td>16 May</td>
<td>5 hrs @ $40 ph</td>
<td>$200</td>
</tr>
<tr>
<td>Writing script</td>
<td>Lucas</td>
<td>23 Jul</td>
<td>7.5 hrs @ $40 ph</td>
<td>$300</td>
</tr>
<tr>
<td>Writing script</td>
<td>Lucas</td>
<td>25 Jul</td>
<td>7.5 hrs @ $40 ph</td>
<td>$300</td>
</tr>
<tr>
<td>Meeting with producer</td>
<td>Hannah</td>
<td>27 Jul</td>
<td>2 hr @ $46 ph</td>
<td>$92</td>
</tr>
<tr>
<td>Progress meeting and further action</td>
<td>Hannah</td>
<td>1 Aug</td>
<td>1 hr @ $46 ph</td>
<td>$46</td>
</tr>
<tr>
<td>Incorporating feedback into scripts</td>
<td>Lucas</td>
<td>15 Aug</td>
<td>1.5 hrs @ $40 ph</td>
<td>$60</td>
</tr>
<tr>
<td>Filming supervision</td>
<td>Hannah</td>
<td>20 Aug</td>
<td>22 hrs @ $46 ph</td>
<td>$1,012</td>
</tr>
<tr>
<td>Photographer</td>
<td>Blue Skies Photography</td>
<td>25 Aug</td>
<td>Quoted fee</td>
<td>$350</td>
</tr>
<tr>
<td>Finalising video</td>
<td>Hannah</td>
<td>5 Sept</td>
<td>3 hrs @ $47 ph</td>
<td>$141</td>
</tr>
<tr>
<td>Writing viewers guide</td>
<td>Nila</td>
<td>6 Sept</td>
<td>15 hrs @ $35 ph</td>
<td>$525</td>
</tr>
<tr>
<td>Editing and proofing</td>
<td>Nila</td>
<td>10 Sept</td>
<td>7 hrs @ $35 ph</td>
<td>$245</td>
</tr>
<tr>
<td>Desktopping</td>
<td>Emu Publishing</td>
<td>12 Sept</td>
<td>Quoted fee</td>
<td>$1,800</td>
</tr>
<tr>
<td>Preparing video cover and label</td>
<td>Nila</td>
<td>6 Sept</td>
<td>2 hr @ $35 ph</td>
<td>$70</td>
</tr>
<tr>
<td>Printing viewers guide</td>
<td>One-Stop-Shop Printers</td>
<td>14 Sept</td>
<td>Quoted fee</td>
<td>$2,500</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td></td>
<td><strong>$34,941</strong></td>
</tr>
</tbody>
</table>
In many cases, less specific KPIs need to be set. This may be because the activity a person or team is working on is difficult to measure or qualitative in nature. Here are some examples of qualitative KPIs:

- working well as a team
- producing high-quality work.

These KPIs may be measured through team reflection and discussion on how well the group worked together or by using a set of criteria to measure high-quality work.

**Qualitative measurements**

Control implementation

To effectively control the process of implementation, the frontline manager must verify that all activities confirm the operational plan, the instructions issued and the principles established.

KPIs help to identify areas that need improvement. For example, a KPI that measures the number of times the computer system crashes will highlight a problem if results consistently show the system operating at only 85 per cent efficiency.

Here are some guidelines for setting KPIs.

<table>
<thead>
<tr>
<th>Easily understood</th>
<th>KPIs must be easily understood</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Don’t establish confusing KPIs. They must be clear, concise and easily understood by all relevant stakeholders.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Communicated</th>
<th>KPIs must be communicated</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>All stakeholders must be aware of the KPIs. This helps staff understand the importance of their tasks, inspires and motivates them to achieve, and builds a strong sense of team.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Appropriate</th>
<th>KPIs must be appropriate</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Don’t set a KPI that requires a complex activity to be completed within a week. KPIs must be relevant, appropriate to the task and achievable.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Measured accurately</th>
<th>KPIs must be measured accurately</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>For each KPI you put in place, note how it will be measured. Wherever possible, try to implement measures that are quantifiable.</td>
</tr>
</tbody>
</table>
The likelihood of the risk occurring

Once you have made a list of the potential risks against each task, you should rate the likelihood of these events occurring, from very high to very low, and the potential impact they will have on your ability to implement the plan. This can then be used as a guide for developing your contingency plan.

Here is an example of a grid you can use to rate the likelihood of the risk and its potential impact.

<table>
<thead>
<tr>
<th>Likelihood of event occurring</th>
<th>HIGH (possible)</th>
<th>LOW (unlikely but could happen)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impact on plan if event occurred</td>
<td>HIGH (would affect task very much)</td>
<td>LOW (would not affect task very much)</td>
</tr>
</tbody>
</table>

Once you have entered all the risk factors for a particular task into the grid, you are able to prioritise your contingency planning. An event with a HIGH-HIGH probability will need much more attention than an event with a LOW-LOW probability. Some events with a LOW likelihood and a HIGH impact should be placed high on your prioritisation list because if they occur, recovery would be critical.

Example: potential risks for a customer mail-out

A planned mail-out to customers consisting of a mail-merged letter, a marketing catalogue (printed by an outsourced printer) and a flyer advertising the month’s special offer (developed in-house) may have a range of potential risks.

These potential risks are listed in this likelihood/impact grid. The tasks that appear in both HIGH cells of the grid should be addressed immediately.

<table>
<thead>
<tr>
<th>Likelihood of event occurring</th>
<th>HIGH</th>
<th>LOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Staff may be away for a day</td>
<td>• Information needed for the catalogue is not received</td>
<td></td>
</tr>
<tr>
<td>• The printer may not deliver on time</td>
<td>• Key people may become ill</td>
<td></td>
</tr>
<tr>
<td>• No supply of envelopes</td>
<td>• The typesetter may not be skilled enough to format the new design</td>
<td></td>
</tr>
<tr>
<td>• Photocopier may break down</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Not enough time is allocated</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Impact on plan if event occurred</th>
<th>HIGH</th>
<th>LOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>• The typesetter may not be skilled enough to format the new design</td>
<td>• Staff may be away for a day</td>
<td></td>
</tr>
<tr>
<td>• Information needed for the catalogue is not received</td>
<td>• No supply of envelopes</td>
<td></td>
</tr>
<tr>
<td>• Key people may become ill</td>
<td>• Not enough time is allocated</td>
<td></td>
</tr>
<tr>
<td>• Photocopier may break down</td>
<td>• The printer may not deliver on time</td>
<td></td>
</tr>
</tbody>
</table>
## Practice task 4

The tasks in this table show the steps required to prepare a planning day for your team to focus on future directions.

<table>
<thead>
<tr>
<th>Task</th>
<th>Time to complete</th>
<th>Predecessor</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Prepare program</td>
<td>2.0 days</td>
<td>None</td>
</tr>
<tr>
<td>2. Obtain guest speakers</td>
<td>2.0 days</td>
<td>Task 1</td>
</tr>
<tr>
<td>3. Organise team activities</td>
<td>3.0 days</td>
<td>Task 1</td>
</tr>
<tr>
<td>4. Organise catering</td>
<td>1.0 days</td>
<td>Task 1</td>
</tr>
<tr>
<td>5. Design program</td>
<td>1.0 day</td>
<td>Task 1, 2,3 and 4</td>
</tr>
<tr>
<td>6. Print out program</td>
<td>1.0 day</td>
<td>Task 5</td>
</tr>
<tr>
<td>7. Distribute program</td>
<td>0.5 day</td>
<td>Task 6</td>
</tr>
</tbody>
</table>

Assess all of the tasks required in the preparation for this planning day and note four potential high-risk factors, along with possible contingencies that are needed to manage the risk event.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Risk and Impact Involved</th>
<th>Contingencies</th>
</tr>
</thead>
</table>

*continued ...*
Topic 2
Implement resource acquisition

Acquiring resources – employees, goods and services – to help implement operational plans is one aspect of a frontline manager’s responsibilities. Resource acquisition can be the most costly part of any implementation plan, but is also one of the most critical. After all, how can you implement a plan successfully if you don’t have the right tools for the job? Activities relating to resource acquisition should follow the guidelines, rules, procedures or practices used within your organisation, such as human resource and purchasing policies, standard operating procedures (SOPs) or undocumented practices that have not been formally adopted by the organisation but are accepted as part of its processes.

In many organisations, recruiting staff and purchasing goods and services are specialist functions undertaken by human resources (HR) or purchasing departments. Sometimes, recruitment is outsourced to specialist recruitment agencies.

In this topic you will learn how to:
2A Recruit and induct employees within organisational guidelines
2B Implement plans for the acquisition of material resources and services
week. You may need a full-time staff member for long-term or ongoing plans, or you might need to second an existing employee from another section or team. The different methods of recruitment are explained below.

### Human resources or recruitment departments

Many large companies or government departments have specialised human resources or recruitment departments that act as consultants to frontline managers. They may assist with writing job descriptions, advertising positions, reviewing applications, and interviewing and appointing candidates.

### External recruitment services

Some organisations outsource the process to external companies who are experts in recruitment services. Frontline managers can consult with these external companies and work with a consultant to find the most appropriate person for the job. In these instances, frontline managers may brief the consultant, who then works to present them with a short list of potential candidates.

### Recruitment by frontline managers

Other organisations provide frontline managers with guidelines and procedures for staff recruitment. They may also provide some level of specialist training in recruitment.

In smaller companies or those with less formal processes in place, recruitment processes may be more flexible and the manager’s own experiences and preferences may form the basis for recruitment.

### Sources of recruitment

New staff can be recruited from a number of sources. Recruitment sources include:

- advertising within the organisation
- using employee or personal references
- job placement services, such as those approved by Centrelink
- newspaper advertisements
- employment websites
- specialist recruitment (or search and selection) agencies
- professional bodies and unions
- tertiary education institutions
- organisations that provide services to particular groups of people; for example, people with disabilities.

### The selection process

If an organisation handles its own recruitment, the first step is to advertise the position. The role of the advertisement is to attract a number of suitable candidates. It needs to be clearly written and adequately describe the job. Due to budget restrictions, many organi-
Where tight budgets have affected staff numbers, different solutions are used to resolve staffing issues. For example, larger organisations may offer employees temporary transfer to another role or position. Usually, the problem of insufficient staff numbers calls for discussion with more senior managers, a rearrangement of priorities and a focusing of team members’ time on only the most pressing and important aspects of the operational plan.

**Induction for new employees**

Once you’ve hired new staff or existing staff have been reassigned, they need to undertake induction training before they start work. Effective induction training brings a range of benefits to both the organisation and the employee. In many industries, such as building and construction, induction training is vital to ensure the safety of employees while on site.

**Variations in the approach to induction training**

Every organisation’s approach to induction training varies. Some companies have their own training departments that provide employees with complete training. Others have material on hand for new employees to review, while others still rely on frontline managers and team members to assist new staff in a hands-on approach to learning about their new position and employer.

**Ongoing induction**

Induction does not necessarily stop after the employee’s first day or week, but rather should continue until the employee is confident in their role. A frontline manager might delegate another employee to mentor the new recruit – to support them and offer suggestions about specific policies and procedures.

**Inducting contractors and temporary staff**

Contractors and temporary staff also benefit from a brief introduction to their new workplace, including meeting colleagues, being briefed on key issues (such as work health and safety, company policies and facilities) and understanding why their role is critical to the organisation.

**Sharing the company’s vision and mission**

Induction training is also an opportunity to share the company’s vision and mission, its strategic goals and the specific sections of the operational plan staff are responsible for.

**The benefits of induction training**

For businesses, appropriate induction training improves staff retention rates. Businesses benefit from having happy employees who are confident in their roles, have good communication skills and feel that their employer values them. Employers also report that recruitment costs such as advertising and induction training are reduced through higher staff retention rates. In addition, staff who are fully trained have developed their skills and are better able to move to other, more senior roles within the organisation. Over time, organisations that provide thorough training to their employees see an im-
Purchasing process

All staff should be familiar with the organisation’s purchasing guidelines. These guidelines help managers purchase goods or services effectively while ensuring that suppliers meet relevant standards, costs are minimised and purchases are made in a consistent manner across the organisation.

Some organisations have less formal processes in place. Many companies simply have an order book. Senior members of staff have authority to sign off or provide approval for purchases of goods and services up to a nominated level. As each request is made, it is assessed based on need and the cost of the item. Larger items may need to receive multiple sign-offs or approval from a board of management or directors.

Purchasing criteria

While many purchasing practices and policies are focused on ensuring an organisation gets good value for money, many organisations consider other criteria when purchasing goods and services. In these situations, the method of purchasing may help to achieve a goal or reflect the company’s vision or mission; for example, to promote environmentally sustainable products or use Australian-owned suppliers wherever possible. These criteria often include quality considerations as well as ethical considerations, such as only buying from environmentally friendly suppliers or purchasing from organisations that support particular social causes.

Selecting providers

The frontline manager needs to make well-informed choices and decisions on what resources they procure. The organisation should be assured of obtaining high-quality, value-for-money products and services that meet their needs and are delivered on time and to the requested standard. You should develop sound business relationships with all providers so you can be confident of receiving excellent customer service. Good providers are those that: listen to and understand your needs, deliver when requested, deal only in high-quality goods, are competitive in terms of prices, deal promptly and efficiently with any problems and are reliable.

Once a relationship has been established, good providers give their customers extras such as special offers, discounts and complementary goods.

Centralised purchasing departments

Many organisations have specialist internal units that procure the goods and services the organisation needs to function effectively. These resources include anything from basic everyday items (such as stationery used in offices) to more expensive items (such as computers or mobile telephones) and specialist items (such as consultancy services). The functions and benefits of a centralised purchasing department are explained here.
Topic 3
Monitor operational performance

Operational plans must be regularly reviewed against both the organisational goals and the goals set for each activity. Monitoring performance indicates how well the activities are progressing, if the team is keeping to time lines and budgets, and where there is a need to implement contingency plans. An operational plan should be a ‘living’ document, which means it can be adjusted when necessary to improve performance.

In this topic you will learn how to:
3A Monitor performance systems to assess progress
3B Analyse financial information to monitor performance
3C Identify unsatisfactory performance and take action
3D Support staff to use resources effectively, economically and safely
3E Present recommendations to vary operational plans for approval
3F Implement systems, procedures and records associated with performance
are being achieved and also know something about why goals are or are not being met.

**Example: the value of PPIs**

You are the shift supervisor for nursing staff in a hospital emergency ward. The hospital has trained staff to work safely; for example, they are trained on where and how to dispose of used syringes and how to properly lift patients in and out of bed. At the end of each shift, you need to complete paperwork stating how many workplace accidents have occurred during your roster. Each shift has a KPI relating to injuries.

If a nurse is injured during your shift, standard operating procedure at the hospital stipulates that you need to conduct an interview with the nurse. You need to find out whether they followed WHS procedures or not, or if the accident was unrelated to any procedures currently in place. If one of your nursing staff was jabbed by a used syringe, it would be a very serious issue indeed. In trying to minimise future injuries, it would be helpful to know whether the nurse had followed the procedure for disposal of syringes they had been trained in. If they had not followed the procedure, you would need to confirm that they had attended training and that the training was properly conducted.

If they had followed the procedure and were still hurt, then other questions may arise such as:

- What went wrong?
- Has something changed since training was conducted; for example, are different disposal containers being used?
- How could the team prevent this from happening again?
- Do you need to adjust your procedures and retrain staff?

Data collected from a number of people is even more telling. Using the emergency ward example, if the nursing staff injured over the period of a year admitted they did not follow procedures because they didn’t attend training, then the real problem is ensuring nursing staff attend safety training. This way, organisational resources can be best directed toward areas where improvements can be made.

**Use KPIs and PPIs together**

KPIs and PPIs used together must be meaningful, easy to measure and related to each other in the context of the operational plan you are working to implement. Make sure all team members understand what these indicators are and how they will be measured.

Using both PPIs and KPIs highlights two things:

1. Processes enable staff to achieve goals. However, processes don’t achieve goals – people who follow processes do.
2. Measuring the achievement (or non-achievement) of goals is a good indicator of whether an organisation is on track with its operational plan. It is just as critical to know why goals are – or are not – being achieved.
Frontline management responsibilities

Frontline managers should be aware of all the factors that affect their budget and how they might control and manage them. For example, managers must know which months spending may be high; the percentage of their budget that must be spent on consumables, staffing, promotional activities and training; how to make efficient use of available funds if the budget gets cut; and current costs when resourcing goods and services. Team members should also be aware of the budgets they have some control over. Some managers share budget performance figures with their staff on a regular basis, just as they share other KPIs or performance measures.

The financial responsibilities of a frontline manager are detailed below.

- **Manager**
  - Frontline manager

- **Purchase of resources**
  - Making decisions regarding the purchase of resources

- **Fees for contractors**
  - Negotiating and preparing appropriate fees for consultants or contractors that accurately reflect all the costs involved and ensure the organisation gets value for money

- **Budgets**
  - Preparing accurate budgets for projects and team activities so actual expenditure meets or is below the projected expenditure

- **Cost reduction**
  - Recommending actions to reduce costs

- **Break-even analysis**
  - Conducting or assisting with a break-even analysis, which analyses the relationship between sales volume and profitability
Example: extract of help desk manager’s report

Here is an extract of a help desk manager’s report.

**Summary of successes and problems**

Our team was able to answer all calls within the targets we set for ourselves this quarter. This reflects the fact that we recently added an additional staff member to the help desk team. The appointment of this additional person has helped us to respond to the increased number of calls we have experienced as a direct result of the installation of the new system.

We were unable to resolve 90 per cent of problems within our target of 24 hours due to a computer virus that infected 29 computers within the organisation. Unfortunately the nature of this virus was such that the systems needed extensive repair work, all within the same week, and our staff were unable to deal with the unexpected volume of breakdowns and needed an extra day to get the systems back online. This problem also meant that more work hours than expected were lost.’

Approval of the help desk manager’s request for an additional staff member has proven to be a good move. The problem of the virus might prompt management to wonder what could be done to avoid such issues in future or to implement a contingency plan to help avoid such a situation occurring again. Risk management can be undertaken to either stop the virus infecting computers in the first place or, if this isn’t possible, ensure the help desk is resourced adequately so staff are able to respond to such a problem faster if it happens again.

The benefits of reports

A summary report is very useful for senior managers as it can highlight problems as well as successes.

Monthly financial reports will indicate whether a team has remained within its budgeted expenditure. Be familiar with such reports so you can easily identify whether an activity has gone over budget, if expenditure has equalled the proposed expenditure or if the activity is making a profit. In the monthly profit and loss example, the manager can see the company performed better in July, August, September, November, December, January, February and June than in October, March, April and May.
Consult with the team

As the team's performance is monitored on a regular basis – through measuring achievement of performance indicators, budgets and informal observation – managers should share these results and any feedback with team members so they can see where the team has been successful and know which areas need to be worked on. This is important on both an individual and a team level. Don’t simply monitor a team’s performance by noting down successes and failures. Ask team members why the team has or has not met their goals and seek their input on how poor performance can be improved.

Offer support

In terms of helping staff achieve goals, frontline managers need to be prepared to adapt their leadership styles and offer individual team members support in different ways. One of the most significant aspects of any frontline manager’s role is the time they spend mentoring, coaching and supervising their staff. All staff will require support and assistance from their manager at some stage in order to perform their job well. This is particularly critical when staff are new in their positions or when a team is commencing work on a new project or is just beginning to work towards achieving a new set of goals. All people are different and respond in a variety of ways to new pressures and challenges encountered at work. An effective frontline manager helps staff achieve operational goals through providing clear direction and leadership as well as the resources and support they need.

Leadership styles

There has been much research into how managers can provide the right kind of leadership, support and assistance to their staff. It is widely acknowledged that leadership can be challenging for any manager, given the different personalities and responses individuals have to various situations. A popular theory on leadership suggests that managers need to be able to adapt the way they work with different staff members. This theory is known as the situational leadership theory, and was developed by management researchers Hersey and Blanchard in 1982. Variations on this theory are still widely used today. The style that a manager chooses depends on the task at hand and the level of the staff members’ work-related skills and technical knowledge. The situational leadership model lists four styles a manager could use as they deal with different staff members working on different tasks.
The manager should ask:

- Is there enough call centre staff?
- Are clients telephoning the call centre with questions or issues caused by a new marketing campaign or a new product?
- Are clients calling the right department or are they contacting the centre because it’s the only place they know to call?
- Should calls be directed to other areas or could an automated system be set up to provide standard information, such as interest rates?
- Is there a lack of staff due to poor rostering and are issues such as sickness, holidays and other leave taking their toll on staff numbers?
- Have staff been resigning in larger than normal numbers? If so, why?
- Is it taking too long for new staff to be appointed through the bank’s normal HR processes?
- Are staff poorly trained and not handling client issues quickly enough, therefore resulting in longer than usual calls?
- Are staff aware of the maximum wait times on incoming calls?

### Develop solutions

The force-field analysis below highlights that staff are spending too much time looking up the details of a new marketing program. This is having a negative effect on their performance against the plan and making customers unhappy. On the list of positive forces, you can see that staff receive regular systems and procedures training. Therefore a possible solution would be to strengthen the training program to include training on new marketing programs, weakening the negative force of wasting time looking up this information.

<table>
<thead>
<tr>
<th>Negative forces</th>
<th>Positive forces</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time wasted looking up details of new marketing program</td>
<td>High performance standards among staff</td>
</tr>
<tr>
<td>Greater number of calls</td>
<td>Attainable performance targets set</td>
</tr>
<tr>
<td>Time spent forwarding calls to correct department</td>
<td>Regular systems and procedures training</td>
</tr>
<tr>
<td>Not enough staff at peak periods</td>
<td>Responsive to customer needs</td>
</tr>
</tbody>
</table>

Once you have developed a solution, you need to make sure it is practical. How much will it cost? What additional resources are required? What other factors need to be considered? How much impact (low, medium, high) will it have on improving performance? When you have obtained this information, you are ready to prepare your argument for the changes you require, whether they be additional resources or a change to the operational plan.
The role of specialist staff

In many circumstances, experts within the organisation help frontline managers set up and use existing systems, processes and records so frontline management practices are in line with organisational standards and operating procedures. Each organisation has different professionals on hand to help frontline managers use systems and other procedures. Some organisations decentralise much of the responsibility for these processes to frontline and other managers. In these situations, try to identify any commonly used or uniform practices that you can use or adapt for your own team. Specialist staff may include those identified below.

**WHS**

Work health and safety consultants provide assistance when you need to review an existing process or implement a new system that affects or has the potential to affect WHS issues in some way.

**Human resources**

Human resources staff, such as training and recruitment experts, provide assistance when you need to hire new staff or provide training to your existing staff. They also advise you on issues related to employee and industrial relations, payroll and dismissal.

**Purchasing**

Purchasing staff provide assistance when you need to acquire or use goods or services.

**Information technology**

Information technology team members help you set up computer access for staff, resolve IT issues, set up access paths, and set up computer-based processes or tools for your team to use.

**Communications**

Communications and public affairs staff help you clearly and accurately deliver messages and deal with issues of concern and interest to the general public.

**Finance**

Accounting and finance staff help you with your budget or provide advice on finance-related matters that you are responsible for.