Table of Contents

Supervisory Development Program

A seminar for improving supervisors skills

Before we start talking about supervisors and supervision we should have a proper definition for this word. One way is having a look in the dictionary:

The dictionary defines supervision
in the following words:
"the act of supervising, the authority to direct or supervise".
It comes from the Latin ***supervidere***.
Super signifying "**over**" and *videre* meaning "**see**".

Supervision as a management function refers to the act of keeping a close eye on the work of workers and employees in the performance of the jobs assigned to them. Thus, the individual who is in charge with this function and responsibility is generally called a supervisor. Supervision is the process of **"looking over their shoulder"** to see that things are operating correctly.

This seminar is desined to help you to better understand the tasks and responsibilities of a supervisor and give you ideas how to improve your supervisory skills.

Hopefully the outcome of the seminar will enable you to transfer your new knowledge into your company and thus enhance the productivity and quality.

Sabine Schacknat

1.0 Particulars about Supervision

Just imagine:

Until a few weeks ago you were a normal worker in the production line and you received your orders from your boss or a supervisor. They gave you instructions of what to do and how do to it and you were doing it. Two weeks ago the production manager of your company talked to you and offered you a job to be a supervisor yourself. You happily agreed because it means some Pesos more every day and you do not have to do all the dirty work yourself anymore.

Last Monday you started your new assignment and you suddenly realize that this new job is not so easy after all. Before you had to deal only with the work itself but now you have to tell other people what they have to do!

Think about the problems you suddenly have to deal with:

- ➔ Machines are not adjusted properly
- ➔ Dimensions of the product are not accurate
- ➔ Wrong tools are used for the job
- ➔ Wrong materials have been used
- ➔ Accidents are happening
- ➔ Products are not finished in time
- ➔ The quality of the product is not good
- ➔ Jobs take too long to be finished
- ➔ Your former buddies in the production line don't want to have a beer with you after work!

You wonder what is going wrong because you actually thought that you were a skilled wood worker!

Actually there is a **big difference** between the two jobs and you have to recognize what these differences are.

And you have to **learn some new skills** before you are really able to do your new job properly.

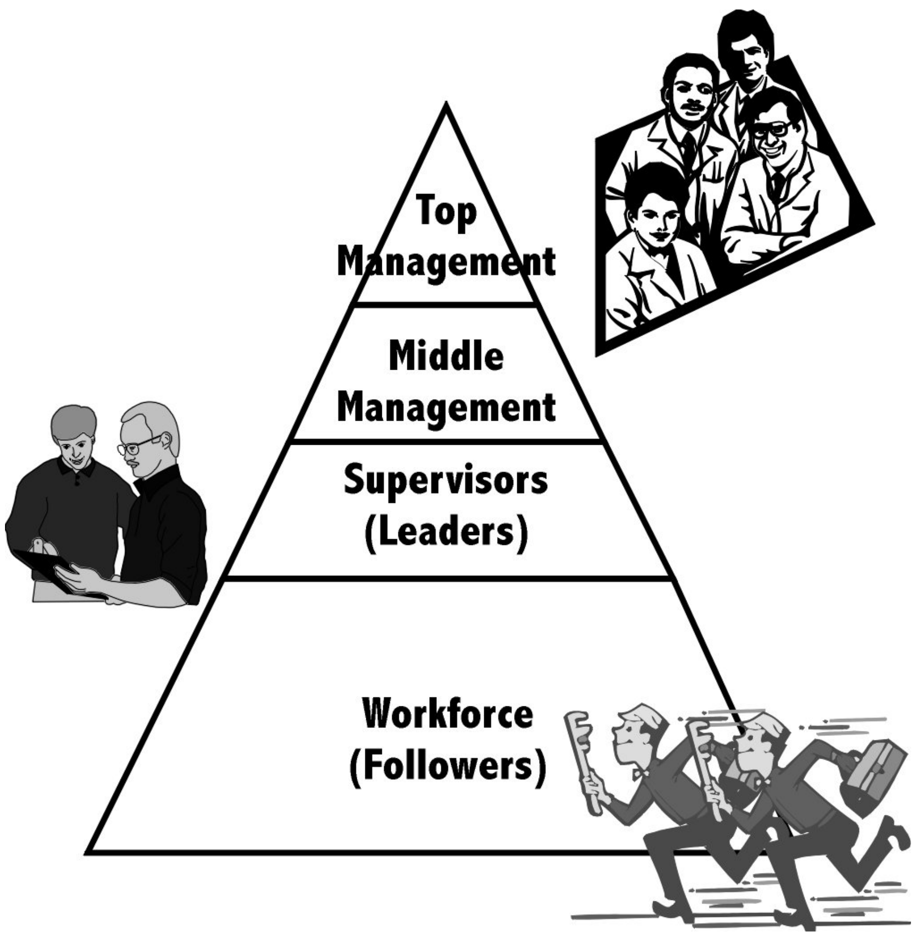
2.0 Organizational Structure and Responsibilities

2.1 Organizational Structure in a company

Let us have a look at the organizational structure of a company to get an idea of what changed in the work life if you change from a worker to a supervisor. In the picture you can see a rough layout of a company's structure. Now, you moved up from the workforce into your new position as a supervisor and that means that you moved up from being a **"Follower"** to being a **"Leader".**

As a follower you received your orders from the supervisor or the middle management and you were following these orders. Sometimes they would ask you for a statement about some problems and you had to report to them.

Your main task was to function as a worker and to do what you were told. The skills you had to provide were mainly technical, on how to run a machine and to use tools. Most of the labor was physical, like planing a piece of wood, the dimensions of the final product were given to you and you had to do it according to the order.

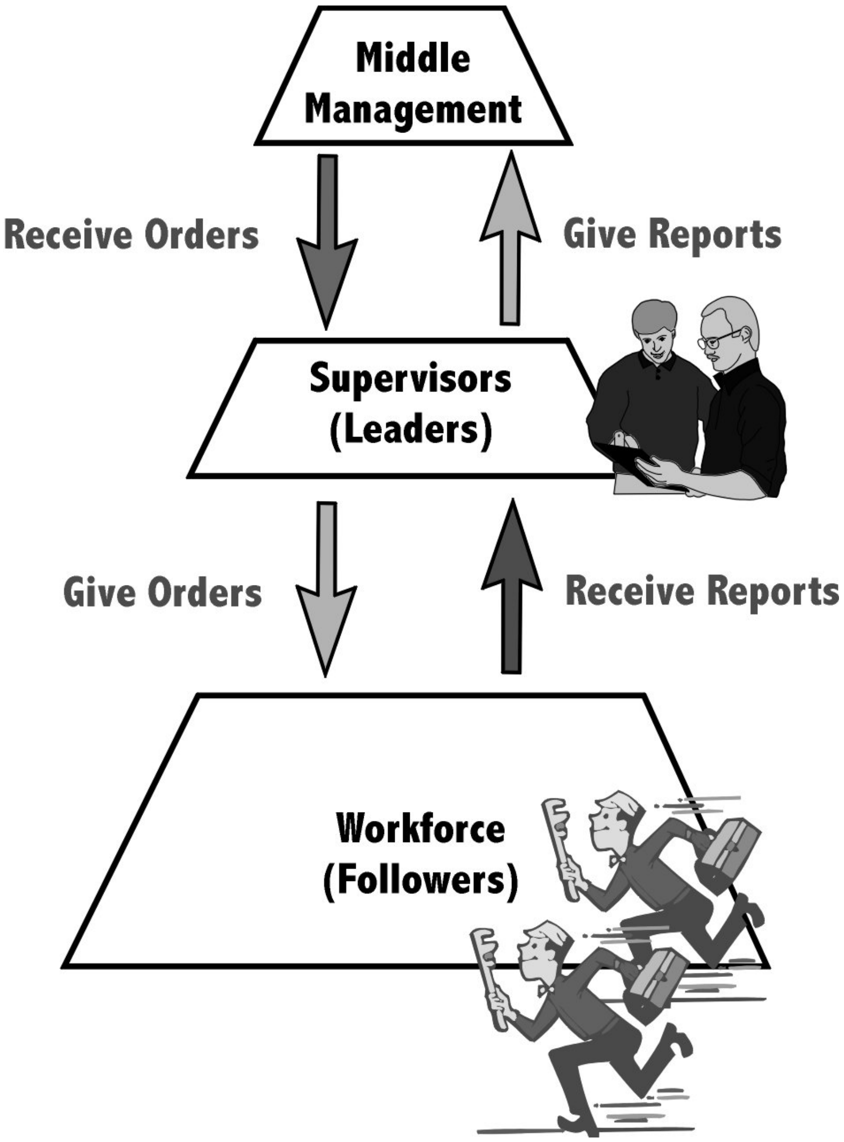


In the new position as a supervisor you will find a completely different situation to handle:

You have to receive orders from the management and give reports to them.

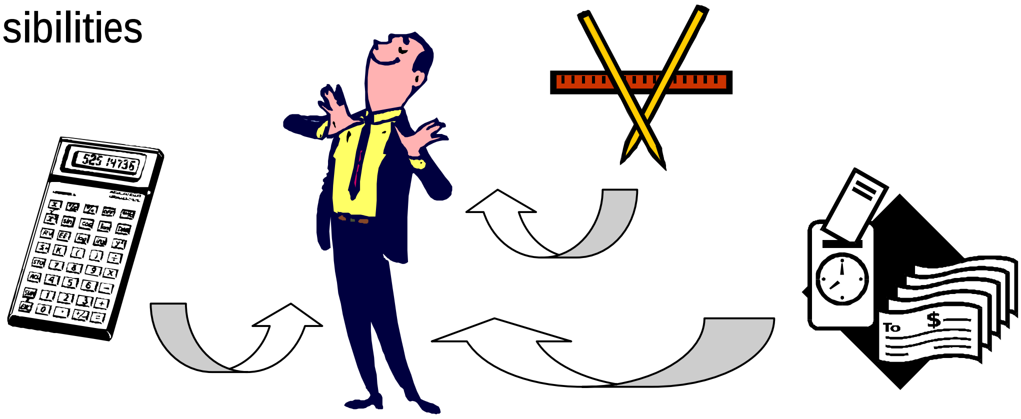
and

You have to give orders to the workers and receive reports from them.



Now it should be easy to understand that most of your work as a supervisor will be more mental and not so much physical.

1.2 Responsibilities



If we have a closer look at the organizational structure we can see that a supervisor has a lot of different responsibilities in his work life:

1.2.1. Responsibility to the Middle and Top Management

The management is expecting from a supervisor to do a lot of things in the department or section. They want to be able to rely on him when it comes to the planning of the work in the section and the coordination of work with other sections *(Example: You are the supervisor in the assembly, so you have to report problems to the management regarding the supply of parts from the machining section).* The supervisor has to be able to train and select employees for specific jobs. It is very important that he is able to communicate with the workers so that they do understand their work assignments.

To maintain work discipline and morale in the section he needs to have a natural authority which has to be based on knowledge and skills. To make the section an efficient one he has to make production decisions such as:

- ➔ *Which job has priority?*
- ➔ *When do we start with the next order?*
- ➔ *Which worker will be assigned at which machine?*
- ➔ *Will the machine work more efficient if you assign two workers?*

At the same time the management expects from the supervisor that he will maintain a proper cost control *(Material waste, proper production flow, unproductive workers).* In order to improve the productivity of the section the management expects written comments and suggestions about the situation.

1.2.2 Responsibility to the Workers of the Department

The workers in the section are the ones who will do the actual jobs like machining, assembly and so on. To achieve a high quality and In Time production the supervisor has to rely on his workers. A good working morale is a very important factor, the supervisor has to get to know the special skills of his workers in order to assign them to the right jobs and explain all the matters connected to this assignments *(special jigs, deadline, tools to use)*. If necessary he has to instruct and train workers for special jobs.

The target is to create a trusting working climate were the workers will be able to talk openly about problems in meetings. The treatment of all workers has to be equally. The workers problems have to be handled correctly, a good relationship with the personnel / staff department has to be established because they can help in all sorts of explanations and problems like workers payment and benefits. Sometimes the supervisor might have to take over the role of a counselor but he has to be careful that he does not get involved personally into the problems, it is very important that he will stay objective in all department matters. The workers will be efficient if the supervisor provide them with a predictible and stable work load.

1.2.3 Responsibility to Other Supervisors

It is very important that each supervisor gets to know all the other supervisors very well in order to establish good working relationships with them. This will improve the work flow between the departments, the exchange of information like deadlines for parts and products, it will help to solve problems with quality and tolerance problems. It is the target to create a supervisor team that can communicate and coordinate properly with the management.

1.2.4 Responsibilities to the Staff / Personnel Department

The staff department will approach the supervisor first regarding information about workers. He has to be able to judge requests for information from staff managers, try to be a middle man in these situations. A supervisor should coordinate standardized reporting forms and instruments with the staff managers in order to judge the employees performance. He should consult with appropriate staff managers to utilize their special expertise on staff problems (work attitude, late, drinking, fighting…)

1.2.5 Responsibility in Labor Matters (if company is unionized)

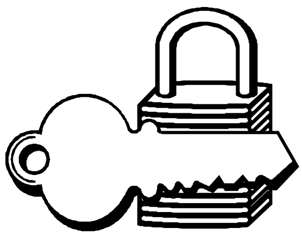
The supervisor has to know the basics of the CBA (Collective Bargaining Agreement) to keep a professional relationship with the union. He has to respect the terms of the agreement as a representative of the employer, even though he may personally disagree with it. The treatment of all workers has to be equally, union members or not.

1.2.6 Responsibility in general

The main purpose of supervision is to determine whether the individual who is responsible for the action **understands the information** and the directions that were given to him previously, and whether he is **following them satisfactorily**. The executive seeks to learn where further advice and instruction are needed by the subordinate. Another chief importance of supervision is that it can **catch deviations** of actual from planned results at a time when **corrective action** may be taken immediately. The executive, however, should remember several things about supervision. Many subordinates do not ordinarily like close supervision. As a matter of record, **successful managers do not over-supervise.** Subordinates who have been properly selected and indoctrinated need less supervision than a group seeking a complex of objectives, the significance of which they do not understand.

> Subordinates who have been properly selected and indoctrinated need less supervision

- ➔ Directing
- ➔ Guiding
- ➔ Leading



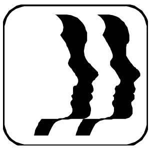
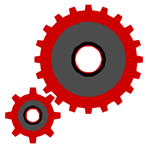
> Create an atmosphere where workers perform their assignments because they want to perform.

Directing, guiding, and leading are three **key words** that sum up the whole spectrum of supervision. Directing is a verbal or written function. It is telling subordinates **what they have to do and how they are to do it.** As a function of order-giving, it may range from a simple request to an authoritative command. The secret of effective leadership is not ordering people, but creating an atmosphere where they perform their assignments because they want to perform them. Exhibiting their leadership qualities, supervisors are able to guide and lead their subordinates grow and develop into capable and reliable workers and employees of which every organization would have reason to be proud of. To be able to direct, guide, and lead, in line with the function of a supervisor of "watching over", he must know what is going on, who is doing what, and what the working conditions are.

> The supervisor must know what is going on, who is doing what, and what the working conditions are.

2.0 Skills required by Supervisors

Based on all the responsibilities a supervisor has in a company we can summarize all the skills a supervisor should have to do a proper job. For the purpose of effective supervision, three sets of skills are required, namely:

3.1 Interaction Skills	3.2 Analysis Skills	Technical Skills
 3.1.1 Communicate clearly 3.1.2 How to delegate 3.1.3 Successful meetings 3.1.4 Motivating people 3.1.5 Discipline 3.1.6 Rewarding performance 3.1.7 Training and developing the staff	 3.2.1 Planning a process 3.2.2 Improving a process 3.2.3 Reducing costs 3.2.4 Daily Routine Activities	
Interaction skills include all the techniques managers and supervisors use to relate to their employees for purposes of providing direction and feedback. Basis for all interaction is the ability to communicate clearly!	**Analysis skills** enable managers as well as supervisors to study problem situations and other aspects of management, break into the minutest details and as such have a clear grasp and understanding of them. With everything set in clear perspective, they are able to formulate and implement the steps that may be found warranted by the circumstances in relation to the whole work system.	**Technicals skills** are very important for a supervisor. If a supervisor is not able to understand the working process and has not the knowledge which is required in his specific area of the production, he will not be able to make the right decisions and to plan properly. The workforce will not respect him because of his lack of experience and knowledge. If a former, excellent worker is promoted to a supervisor or foreman, he usually has enough technical skills.

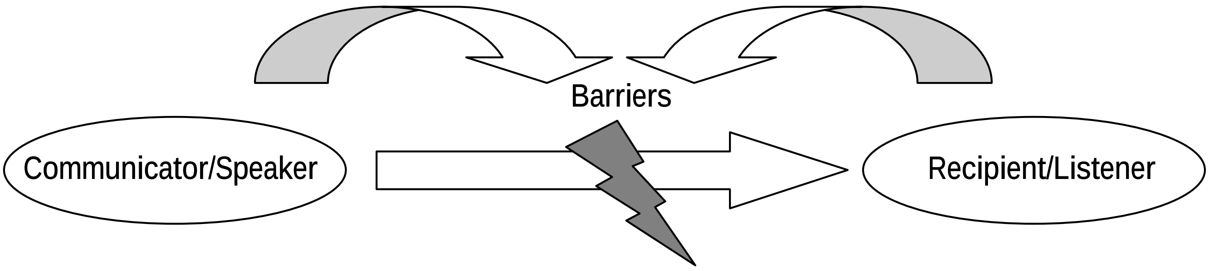
3.1 Interaction Skills

3.1.1. Good Communication

3.1.1.1 Communicate clearly

Good communication is the lifeblood of organizations. It takes many forms, such as speaking, writing, and listening, though its purpose is always to convey a message to recipients. Use it to handle information and improve relationships.

Effective communication hinges on people understanding your meaning, and replying in terms that move the exchange forward – preferably in the direction you would like it to go. Communicating is always a two-way process. There are always at least two parties involved in any communication, each of whom may have different wants, needs, and attitudes.



These wants and needs can present barriers if they conflict with those of the other party, and such barriers may stop you conveying or receiving the right message. Breaking down barriers is one of the first steps towards good communication.

- Maintaining eye contact
- Listening to what the other person is saying
- Mirroring body language

all help you to communicate successfully.

The three rules that govern good communication are all associated with clarity:

- Be clear in your own mind about what you want to say
- Deliver the message properly
- Ensure that the message has been correctly understood

Good communication means saying what you mean – and fully comprehending any feedback.

2.1.1.1 Understanding Body Language and Gestures

Your body language – a huge range of unconscious physical movements such as posture, facial expression, and gestures – can either strengthen communication or damage it. Even if you are sitting completely still, you may be unknowingly communicating a powerful message about your real feelings. Because of its subtlety and range, body language is difficult to read and to control. However, a broad understanding of body language is one route to understanding the real opinions of others.

Make sure you are not unintentionally showing a hostile expression or posture.

Conquering Nerves

The nervousness people feel before making a presentation or attending a meeting is very natural. Use body language to appear more confident than you feel by making a conscious effort to smile and to relax your arms. Look people in the eye while you are talking or listening to them, keep your posture comfortably straight, and do not fiddle with your hands.

Keeping your Distance

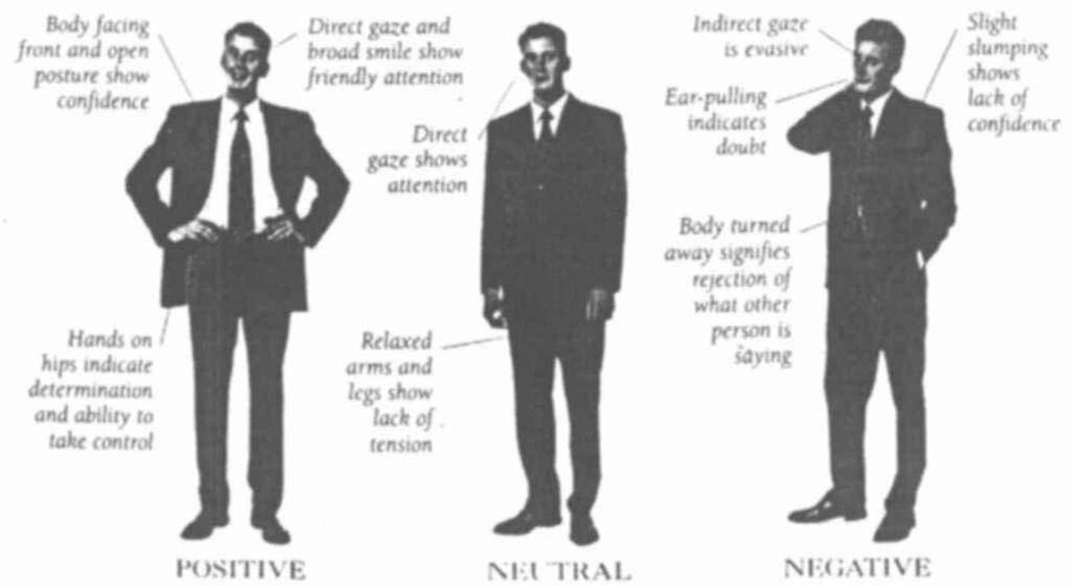
Leaving an acceptable distance between people is part of body language, and this distance changes depending on situation. For instance, guests at a social gathering stand closer to each other than strangers in a non-social situation. Always take care not to intrude into another's personal territory in case you arouse defensive or hostile reactions.

Supportive gestures

Supportive gestures such as making eye contact and nodding while somebody is talking, create empathy – unless the person to whom you are speaking can tell that you are concealing your true feelings. Everyone can control their body language to an extent, but not totally. To avoid that the body language is contradicting you, try to be as honest as possible and show always respect to the one you are talking to.

Communicating by Body Language

Posture is all-important in body language. On a first meeting, these three postures would create very different impressions. The positive posture might have the best effect on the outcome by encouraging open communication, while the negative one would make communication difficult.

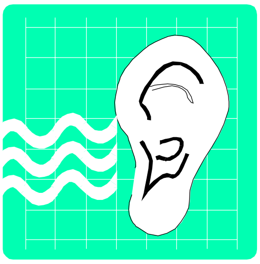


Recognizing Gestures

All skilled public speakers use gestures for emphasis. Devices like smacking your fist into an open palm, pointing, or spreading your palms can all reinforce points you make verbally. Remember that over-assertive gestures, such as banging a table, or other signs of anger, can alienate people.

> Practise a range of gestures in front of a mirror to find those that look natural for you.

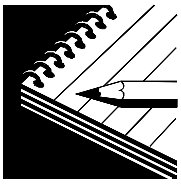
2.1.1.2 Learning to Listen



The two-way nature of communication – so that both sides understand each other – is widely ignored. Listening techniques are vital, since how you listen conveys meaning to the other person and helps to make the exchange successful.

Showing Attentiveness

When you are in search of information, consensus, or a working relationship, the more obviously you listen attentively the better. You may need to speak to get a respons, but show you do not wish to dominate the conversation. Ask open questions, which lead to discussion, and keep your responses brief. Repeat key words silently as you hear them to help you to remember what is said.



If you are taking notes while people are speaking, do not try to write their words in longhand and in sequences or you will fail to keep up. Instead, listen to what is being said and note down the key points in your own words. Try writing a succinct explanation of each point, and use headings and numbers to structure your notes.

Interpreting Dialogue

Take statements at face value without reading hidden meanings into what is being said. Test your understanding by rephrasing statements and repeating them to the speaker. It should then be clear that you have understood each other – or they may correct you and clarify their statement. However, watch for physical signs, such as evasive eye contact, and verbal signs, such as hesitation or contradiction, that provide clues to the thruthfulness of the message. **Be careful not to hear only what you want to hear and nothing else.**

> Keep an open mind about what people say.

Recognizing Prejudice

When what you see or hear only fulfils your own expectations you probably have an inflexible mind-set. Most people have this problem and are unconsciously influenced by stereotypical views. We are also influenced by others, and often adopt their opinions without thinking. **Prejudices block good communication.** If you can recognize your prejudiced ideas, you will be a better listener. A frequent mistake is to assume that you know what somenoe is going to say, and not to listen to the actual message. However, people do not always behave according to stereotype or expectation. Listen very carefully to what people are saying to you and do not let your prejudices get in the way.

> Think about the words you hear, not the person saying them.

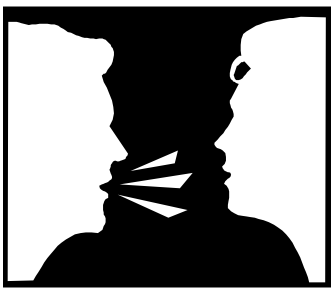
Type of Listening	Putting Methods into Practice
EMPATHIZING Drawing out the speaker and getting information in a supportive, helpful way.	Empathize by imagining yourself in the other person's position, trying to understand what they are thinking, and letting them feel comfortable – possibly by relating to their emotional experiences. Pay close attention to what the person is saying, talk very little, and use encouraging nods and words.
ANALYZING Seeking concrete information and trying to disentangle fact from emotion.	Use analytical questions to discover the reasons behind the speaker's statements, especially if you need to understand a sequence of facts or thoughts. Ask questions carefully, so you can pick up clues from the answers and use the person's responses to help you form your next set of questions.
SYNTHESIZING Proactively guiding the exchange towards an objective.	If you need to achive a desired result, make statements to which others can respond with ideas. Listen and give your answers to others' remarks in a way that suggests which ideas can be enacted and how they might be implemented. Alternatively, include a different solution in your next question.

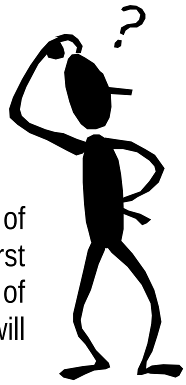
Acting on what you hear

In some cases, communication is an end in itself – an update on progress, for example. In others, action is vital – clearing a bottleneck in the production, say. What you must never do is promise an action and fail to deliver. A classic example is the employee attitude survey, which always raises expectations of action to remedy management errors. Failure to act on the survey findings means you have not listened and instead delivers a harmful message. Keep your promises – and take action as soon as possible.

> Keep promises in writing as soon as you can to avoid misunderstandings.

Listen → Respond → Act

3.1.1.3 Asking Questions

Knowing what to ask

The right questions open the door to knowledge and understnding. The art of questioning lies in knowing which questions to ask when. Address your first question to yourself: if you could press a magic button and get every piece of information you want, what would you want to know? The answer will immediately help you compose the right questions.

Choosing questions

> Ask a specific question if you want to hear a specific answer

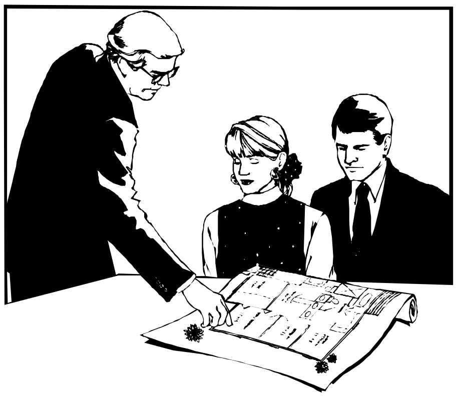
When preparing questions in advance, always look at the type of question that best meets your aims. You may want to initiate a discussion, obtain specific information, attain aparticular end, or send a command cloaked as a query. However, be aware that prepared questions will rarely be enough – answers to them may be incomplete or may prompt a whole new line of questioning. Keep asking questions until you are satisfied that you have received the answers you require. When asking prepared questions, watch out for clues in the answers that you can follow up later with a new set of questions.

Striking the right tone

Your tone of voice is a part of communication in itself – for example, you may convey anger by speaking harshly or sympathy by speaking softly. The wrong tone may generate a counter-productive response, so work on improving your ability to manage your voice. Practise until you are happy with how you sound. You can often steer pople towards agreement by using an optimistic and confident tone of voice.

Type of Question	Examples
OPEN Question does not invite any particular answer, but opens up discussion.	What do you think about the company setting up a canteen for all members of the staff? I think it is a good idea.
CLOSED Question is specific and must be answered with a yes or a no.	Do you ever read the company magazine or newsletter? No.
FACT-FINDING Question is aimed at getting information on a particular subject.	What percentage of staff has replied to the employee survey? Out of 2,000 questionnaires we got 70 per cent.
FOLLOW-UP Question is intended to get more information or to elicit an opinion.	Is this a good response compared with last time? Two-third is average, so this indicates reasonably good morale.
FEEDBACK Question is aimed at getting a particular type of information.	Do you think that the content of the newsletter has improved? Yes, I like especially the new reports about the sections.

3.1.1.4 Working with Feedback



Managers and supervisors spend much of their time delivering and receiving messages in person. This can be the most critical – and satisfying – arena of communication. Honesty and feedback are both essential if you are to achieve clarity and progress.

Being Understood

Delivering a message that may be misunderstood is all too easy. It may happen because you are not clear about what you want to say; or because your language is vague even though your objectives are clear; or your body language contradicts your verbal message. A useful way to avoid misinterpretation is to **get the recipients to repeat your message** – you can then use their feedback to try to correct any misapprehensions. Use positive body language to emphasize your verbal message.

Giving Feedback

Feedback is essential to communication – to check that you have understood the other person's message, and to react to what they have said and done. It is vital that you react honestly to the statements or actions of your employees or staff members. Give reasons for positive feedback, and use questions when giving negative feedback. It can be difficult to give negative feedback, but remember that it is bad management to avoid doing this. When giving negative feedback, follow these simple rules to avoid any antagonism:

- Show an understanding of exactly what went wrong and why.
- Draw out ways in which poor performance or behaviour can improve.
- Use questioning to let the staff member know what you think and why.
- Aim to express your negative opinions honestly, but in a positive manner.
- Above all, take negative feedback away from the emotional zone by being objective, not personal.

Below are some examples that you can use:

"I especially like how you found a solution for using an existing cutter block in producing the item."

"You are the right person for this job, because..."

"Would you agree that this sample is very unsatisfactory?"

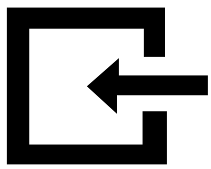
3.1.1.5 Giving and Receiving Orders

When you were a worker you received your orders from a supervisor and now you receive them from somebody from the middle management. What is the difference between the two?

- As a worker you normally received an instruction for one job and when that was finished you got the next one. The communication was pretty easy because you and the supervisor spoke the same “technical language” and he could even help you with some complicated setups or jigs.

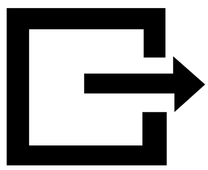
- Now you have to communicate with somebody from the middle management and you might have problems understanding him. What is wrong? The fact is that you and him are not speaking the same “language” anymore because you are a ”technician” and he is a “manager”. You have to learn to follow his instructions even so his technical knowledge might be limited. Apart from that you will not only receive one single instruction, but most probably orders for the whole day.

Receiving Orders



You have to translate the instructions you received from the middle management into technical language and distribute the different jobs to your workers. It is very important to write down the instructions you receive because there might be many of them and you might forget some details. With the help of these written notes you can break down the work into small steps, decide what machinery you want to use and which worker would be the right one to choose. You have to prepare a time schedule for the work and compare it with the ongoing processes in the workshop so that you will know which machine and which worker is available when. Than you can make a plan for the day(s) and you will be able to formulate proper instructions to your workers.

Giving Orders

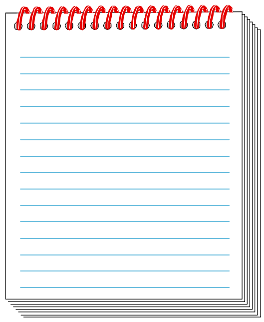


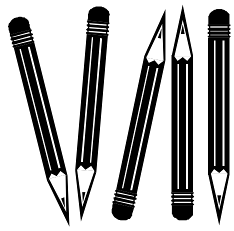
It is very important that you know the technical details of the process you want to explain to somebody else. All the processes of the work should be easy for you to explain. If you are not certain in a specific area you have to familiarize more with the machine and the process before you start explaining things to somebody else. In order to give good instructions you have to plan them. Before you give instructions, take a piece of paper and write down keywords for the processes you want to explain.

You have to be able to demonstrate the work process, this will support your explanations very much. Think about safety aspects before you make a demonstration because you have to consider that the worker will copy your action later on.

You can only be self confident and have some authority if you learn and practice the above mentioned factors. The workers will only accept you as a supervisor if you have authority based on knowledge.

3.1.1.6 Compiling Reports





Reports are formal documents that will be read by others. They must always be accurate and well laid out, finishing with a definete conclusion.

Researching a report

If you are reporting on an activity of your own, check every fact to ensure acccuracy. If you have been asked to report on a subject – say, a new market for a product – write down what you need to know as a series of points. Then note the sources you can tap and match them to the points, making sure everything is covered. Before finalizing, get information supplied by one source confirmed by at least one other reliable authority.

Structuring a report

Write the purpose of a report and summarize its main conclusions in your opening paragraphs. In the body of the report, support your findings with evidence, set down in logical sequences, in numbered paragraphs. Use headings, subheadings, and bullet points, all of which are effective structural aids, drawing attention to key facts. Use underlining and bold type for emphasis. End the report with recommendations for action in summary form.

Ensuring clarity

Reports are not works of literature, but good ones follow the rules of good writing. Avoid ambiguities. If you are unsure about your conclusions, state the alternatives and invite the readers to make up their own minds. Express yourself in short sentences. Above all, put yourself in the readers' shoes. Will they understand what you mean? If you can, get a friend or colleague to read the report before you distribute it.

Be ruthless:
Cut out all unnecessary words in your report.

DO'S	DONT'S
▪ Do make each report interesting. ▪ Do emphasize your most important findings and facts. ▪ Do use numbered paragraphs to make cross-referencing easier and to keep points separate. ▪ Do use headings for changes of subject and sub-headings for related themes.	▪ Don't write long, unbroken paragraphs. ▪ Don't overuse the first person singular (I) or allow your personal prejudices to show. ▪ Don't draw conclusions from insufficient evidence. ▪ Don't print your report without thoroughly checking your sources.

3.1.2. How to delegate

3.1.2.1 What is delegation and why to do it

Explaining Delegation

Delegation involves intrusting another person with a task for which the delegator remains ultimately responsible. Delegation can range from a major appointment, such as the leadership of a team developing a new product, to one of any number of smaller tasks in the everyday life of any organization – from arranging an annual outing to interviewing a job candidate.

> Delegate to boost staff morale, build confidence, and reduce stress.

Increasing your time

Managers and supervisors commonly claim that the short-term demands of operational and minor duties make it impossible to devote sufficient time to more important, long-term matters. Strategic planning, control, and training are among the higher level activities which will suffer under the burden of undelegated, routine tasks which you wrongly attempt to do yourself. To create more time for yourself, more routine work must be handed down by delegation. Also, the more frequently you delegate the more experienced staff become, and the less time you need to spend on briefing.

> Set aside enough time each day for concentrating on your long-term projects.

The costs of avoiding delegation

Delegation takes time to organize and prioritize but the costs of avoiding it are high. The manager who does not delegate will not only seem disorganized, but will spend many hours each week completing low-priority tasks. This can result in:

- Excessive hours worked by senior managers or supervisors
- Low morale among under-employed staff
- Basic processes slowed down by bottlenecks
- Poor quality of work
- Missed deadlines

Questions to ask yourself

- ☐ Am I devoting enough time and resources to strategic planning and overall monitoring?
- ☐ Is my desk overflowing with uncompleted tasks?
- ☐ Am I delegating routine but necessary tasks to staff?
- ☐ Is staff training given priority to ensure effective skills for future delegation plans?

3.1.2.2 Recognizing and dealing with barriers

Barrieres preventing delegation are often based on negative feelings of insecurity and mistrust.

Doing it yourself

As a supervisor, you will probably be more efficient at many tasks than your staff. But if you attempt to do everything because you are quicker, surer, and more proficient you will inevitably find yourself overburdened. As a result you will not have sufficient time to spend on the higher-level tasks that only you can do.

Avoid keeping work because you do it better

Overburdening staff

The fear of overburdening staff is a strong barrier to delegation – it is natural for good supervisors to want to ensure that staff workloads are not excessive. If staff members appear to be working to full capacity, how can you delegate tasks without overburdening them? One solution is to keep back tasks and find time to do them yourself. A more sensible approach is to make employees analyze their own use of time and free capacity for more work. If staff shortage is truly the problem, the answer is to take on more staff.

Loosing control of tasks

The desire to be in total control is a common human trait. Delegation involves the loss of direct control, and this loss is a potential barrier to the delegation process. When delegating, the supervisor passes on responsibility for completion of a task to a chosen delegate. The delegator retains overall control by appointing the right person, having a clear idea of how the task should progress, and exchanging regular feedback.

Questions to ask yourself

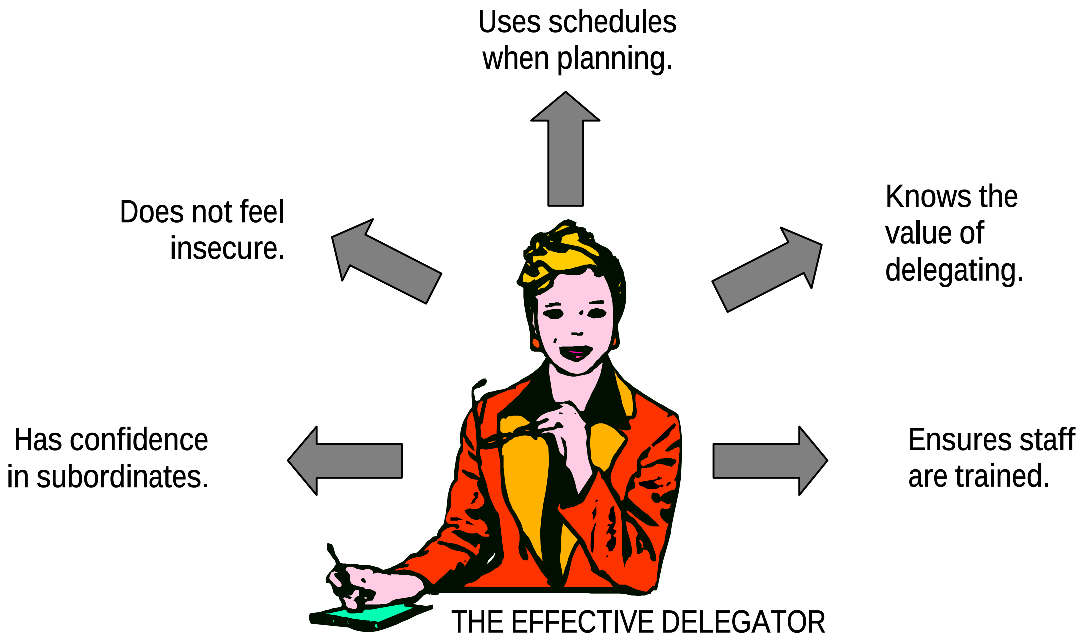
- ☐ Can I learn from the way my own boss delegates to me?
- ☐ Why should it upset me if a subordinate performs part of my job brilliantly?
- ☐ How much spare work capacity is there in my unit?

Dealing with fear

Fear is a major barrier to delegation. Sometimes supervisors fear that delegates will perform so well that they challenge the delegator's own position. A parallel fear is that loosing part of the job diminishes personal importance. These fears may underlie a third – that the delegate will do badly. Tackle the fears by asking yourself four questions:

- ☐ Is the task suitable for delegation?
- ☐ Is the delegate competent to perform the task?
- ☐ Will I brief them fully and correctly?
- ☐ Will I give them all the right backup, authority, and resources?

If the answers are positive, then there is nothing to fear, and the delegation should succeed. Once you have overcome your initial fears, your efficiency as a delegator and supervisor will be greatly increased.



Being to busy

Some supervisors do not delegate enough because they lack the time to explain or monitor the tasks which should be delegated. Therefore, they are always busy doing the tasks that should have been delegated and they don't have time to delegate tasks – a vicious circle. Organize your schedule to ensure that you have enough time available to plan and manage a delegation properly, including writing an effective brief and the actual monitoring of your delegates.

> If you often say "I don't have time", you are badly organized.

Lacking trust

If both sides in the delegation process do not trust each other, the process will be hindered. A manager must have complete confidence in a delegate's ability to perform the task, and delegates should feel that their supervisors are consistent and fair in their approach. Subordinates must feel assured about their supervisors integrity, competence and loyalty. On both sides, trust is conditional. Maintain trust by showing respect to your delegate and by giving honest and constructive feedback during the delegation.

3.1.2.3 Selecting tasks

Before you can start delegating you must decide which tasks you could, or should, be delegating.

Analyzing your time

The way you, as a supervisor, distribute your work and how much time you allocate is probably under your control. A useful exercise is to determine how your actual expenditure of time matches the areas or tasks for which you are responsible. Start the analysis by keeping a detailed time log for at least two weeks: note all activities you undertake and the time they take. You will probably find that only a small amount of your time has been spent on the high-level activities that only you can do. Far more time will have been taken up by routine activities that could have been delegated.

Breaking down your tasks

After analyzing your use of time, analyze the tasks you are undertaking. Do this by dividing the tasks listed in your time log into the three groups outlined below:

Use this breakdown as a basis for reducing any unnecessary activities, delegating more tasks, and concentrating on tasks that only you can complete.

Where delegation seems to be necessary it has to be cleared with your own supervisor.

What tasks am I doing that need not be done at all?	Do not complete them yourself or delegate them.
What am I doing that could be done by somebody else?	Delegate these tasks to subordinates.
What tasks am I doing that can only be done by me?	You cannot delegate these, so prioritize them.

Prioritizing tasks

Having decided which tasks to delegate, your first concern is to allocate these tasks. Then prioritize the tasks you have decided to handle yourself according to their importance and urgency. Start each day by listing these tasks and tackle them one by one in order to priority. If circumstances allow, always complete a task before starting a new one. The closer you keep to this system, to more effective you will be.

Do not attempt to undertake more than seven tasks in one day.

3.1.2.4 Planning a structure

Exploring the fundamentals

The basis issues involved in delegation are **autonomy** and **control**. How much authority is the delegate able to exercise without referring back to the delegator? How far should the delegator exercise direct influence over the work of the delegate? When choosing a delegate, you are assessing whether a particular person is fully capable of performing the task within available resources. Having appointed a delegate, you must ensure that they are allowed sufficient autonomy to undertake the task in their own way, subject to an initial briefing and regular reports on progress.

Understanding the stages:

ANALYSIS	Sorting tasks to be delegated.
APPOINTMENT	Naming the delegate.
BRIEFING	Defining the task.
CONTROL	Monitoring and encouraging.
APPRAISAL	Reviewing and revising.

Setting up a structure

When setting up a structure, your priority will be to ensure that the organizational framework is balanced and responsive to any of the inevitable changes that can occur. Do this by ensuring that each delegate has sufficient support and back-up when unforseen problems arise and that, as far as possible, adequate cover will always be made available in any absence. Inform each delegate of the support structure you have devised so that each knows where they can go to seek assistance immediately in a crisis.

> Ensure to provide enough support and back-up to each delegate.

Avoiding duplication

When planning a structure, delegating, and distributing tasks, avoid giving the same task to more than one person. To prevent confusion, create a chart with all key activities listed on the left-hand side, and the names of those with delegated resposibility along the bottom line. Tick off each box in the chart with both a task and a delegate to reveal any gaps or overlaps in the distribution and structure of the tasks.

Defining the tasks

To delegate effectively, you need to define the tasks and also have a good understanding of a proposed delegate's abilities. So for each task in your planned delegation, work out a clear definition, including the skills required and the range of responsibilities to be delegated.

Setting guidelines

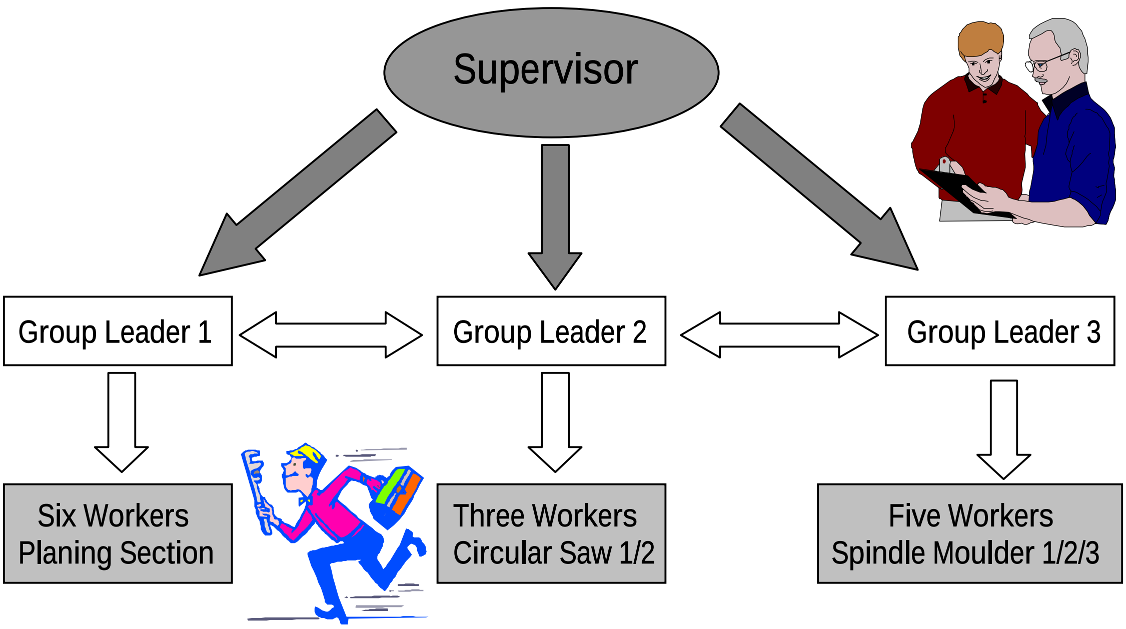
Delegation operates within guidelines, and the most important of these is an understanding that each delegate will be accountable for a specific task. It follows that you must define the tasks very clearly, and the delegate must confirm that they fully understand what the task involves. However clear the delegation, and however much you wish to avoid interference, there are likely be occasions when the delegate does not know what to do. The guideline here is: when really in doubt, ask.

> Make clear to delegates the areas for which they are accountable.

Appointing Sub-Leaders

Create a production team and involve them actively in the planning and decision making. Give them some responsibilities in the production and you can concentrate more on the management of the production. It is a little bit like having your “own company”, now you are in the higher management and you have your own “sub-leaders” as supervisors supporting you in the day to day activities. By creating such an internal department structure you can solve some of the problems related to motivation: By delegating work and responsibilities to your group leaders they feel treated as individuals and they can implement some of their ideas, in the end they feel that their work is meaningful.

- Try to work down with this system to the workers who do not have a lot of self motivation
- Try to get them involved in the system in small steps
- Make notes of their performance, set regular individual meetings to discuss their improvement or the lack of it
- If you see potential in a worker but he lacks certain skills, give him some individual attendance or send him to some training courses outside.
- Sharing authority does not mean giving it away. You as a supervisor always remain ultimately responsible.



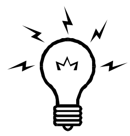
3.1.2.5 Briefing effectively

Using a checklist

When planning a brief, first define your objective and compile a full checklist to ensure that all the individual aspects of a task are included. The more complete the final brief, the more confident you can be that the task will be successfully executed. Your delegation should be based on breaking down a task into all aspects, naming the person who is responsible for each item, and eliminating overlaps of responsibility. Use the checklist to ensure that nothing significant has been omitted from the brief, and that component tasks have an explicit timetable.

Things to do:

- Keep objectives as clear and concise as possible.
- Build a certain amount of flexibility into the brief.
- Base the objectives on requires outcomes.
- Make a checklist to avoid overlaps and omissions.
- Ensure that the delegate is fully aware of the aims.
- Allow the delegate to comment on the brief.



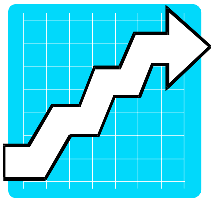
Structuring a brief

Parts of a brief	Factors to Consider
OBJECTIVES Defines the task, listing the major objectives and sub-objectives in clear and concise language.	List all the objectives and discuss them with the delegate before finalizing any agreement. Ensure that this list is referred to continually.
RESOURCES Specifies what personnel, finance, and facilities are available or need to be obtained.	Finalize resource needs after the objectives have been set. Ensure you include the limits to spending authority in the delegate's budget.
TIMESCALE Sets out the schedule with review points, stage completion dates, and final deadlines.	Use the schedule to motivate the delegate and to provide the basis for a critical path analysis showing all the completion stages.
METHOD Describes procedures, as agreed with the delegate, and summarizes the key points.	Devise and agree a thorough outline plan that will provide the delegate with a concrete but flexible methodology within which to work.
LEVELS OF AUTHORITY Specifies the range of the delegate's authority and to whom they will report.	Apply autority limits that tell the delegate when it may be appropriate to refer to you, and when they should use their own initiative.

Briefing sessions
The supervisor's task primary at the briefing is to communicate effectively and ensure the delegate's full understanding of the assignment: Explain the task objective clearly and state your expectations in terms of deadlines and levels of measured achievement. Be clear about which areas of the brief are flexible and which must be followed to the letter

Ending a briefing
Draw the briefing session to a conclusion by summarizing the key points of the delegation. End the meeting by thanking your delegate for taking on the task and communicate your confidence that the assignment will be carried out successfully – it is important to emphasize that you have appointed this delegate because you trust his or her abilities. Finally, establish a date for a follow-up meeting to review progress

3.1.2.6 Monitoring progress



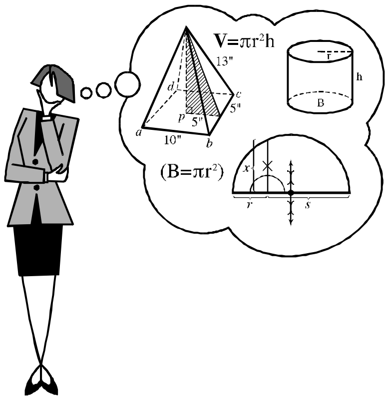
Reviewing progress
Once a task is underway, you will need to review its progress and the performance of the delegate. There are a number of ways in which you can keep tabs on proceedings, including **face-to face discussions** with the delegate, **written reports**, and **personal observations.** Choose a system that suits you, is appropriate to the task, and gives you all the informantion you need to review what has been achieved so far. It must also enable you to check that you are on course to achieve the objective and pinpoint any corrective action that may be required.

Avoiding interference
Supervisors who can maintain a distance between themselves and their delegates are more likely to see positive results. Nobody will work in exactly the same way as you, so resist the temptation to intervene the moment you suspect the task is not being performed your way. Instead, set up a system of regular checks, meetings, and reports, wether formal or informal, to ensure that the task objectives are being met. Heavy intervention, in which the delegator makes all the decisions, will frustrate the delegate and deny him or her the chance to gain experience.

> Operate on the assumption that every process can be improved.

DO'S	DONT'S
▪ Do encourage all delegates to make their own decisions. ▪ Do move from hands-on to hands-off as soon as possible. ▪ Do intervene when absolutely necessary, but only at that time. ▪ Do ask delegates if they feel thoroughly prepared for their task.	▪ Don't say or hint that you doubt the delegate's ability. ▪ Don't miss any stage in the briefing process. ▪ Don't place seniority above ability. ▪ Don't deny a delegate the chance to learn by interfering to much. ▪ Don't take back a task without a good reason.

3.1.2.7 Analyzing Difficulties



Both the delegator and delegate need to analyze, and learn from, any difficulties encountered during a delegation. The first step towards finding a solution to a problem is to ascertain whether it stems from you, your delegate, the task brief, or procedure.

Questioning yourself

Deal with any known difficulties at once.

If a delegated task has not been performed to your satisfaction, look first at your own actions. Perhaps you should have kept this particular task to yourself, or been more selective when choosing a delegate. Go over the brief to find out if you could have made it clearer, and examine your monitoring procedures to be sure that they were adequate for the task. Maybe you made yourself too remote, or did not provide sufficient guidance when problems arose. Be as objective as possible in this self-examination so that you can identify and deal with your own weakness.

Questions to ask yourself

- ☐ Was I too hasty in making the appointment?
- ☐ Is there somebody available who would do better?
- ☐ How can I prevent this problem from recurring?
- ☐ What would I do differently if I could start again?
- ☐ What are the delegate's strength and weaknesses?

Looking at Performance

Results alone will not necessarily tell you all you need to know about the performance of a task. More accurate indicators can be gathered from your **feedback sessions** with your delegate, and other **personal observations**. However, remember that you cannot maintain a delegate's trust if you make inquiries behind his or her back. Be open about seeking relevant information from trusted colleagues and inviting comments from those who are affected by the delegation. If any defects come to light, it is your responsibility to take steps to improve the delegate's performance.

Learning from Failure

The sin is not to fail but to make the same mistake again.

Knowing how to deal with failure may be as valuable as the successful outcome of the task. Take the opportunity when things go wrong to extract as many useful lessons as possible. Naturally, managers and delegates alike will be tempted to come up with excuses rather than explanations when a failure occurs, but excuses elucidate very little and are usually smokescreens that obscure the reals causes of error. When you have identified a failure, carefully analyze the causes and discuss these with the delegate. Always stress that the sin is not to fail but to make the same mistake again.

3.1.3 Successful meetings

Most managers and supervisors feel they spend too much time in meetings. However, a well-run meeting can be a productive way to communicate.

3.1.3.1 Participating a meeting

If you as a supervisor are a participant in a meeting you are not active in the way you are when you are running your own department staff meeting. But you have to be active as a participant.

Being properly prepared

Usually the manager will ask you to give a report about the situation in your department or want to consult you concerning some problems with customers or the production. You have to be properly prepared for the meeting, otherwise you will hinder a productive and positive outcome of the meeting. You should be able to explain the situation in your department clearly by stating facts and numbers. So it would be good to make written notes before the meeting because you might forget things especially when you are excited about the situation. Take also written notes of the management's recommendations in order to implement them later on. If you are not sure that you got all the important points of the meeting do not hesitate to ask.

3.1.3.2 Running a meeting

When you are chairing a meeting, stay in control of the proceedings, and never let arguments get out of hand.

Preparing for a meeting

When preparing for a meeting, ask yourself four key questions:

- ☐ What is the meeting for?
- ☐ Why is it being called?
- ☐ How will I know if it has been successful?
- ☐ Who should attend?

Theses questions will determine wether the meeting is necessary. All meetings should have a purpose that will be achieved by their end. If final decisions are not made, there should at least be a plan of action. The most effective meetings are usually small with only vital people attending.

Circulate all relevant papers before th e start of a meeting.

Opening a Meeting

After making any necessary introductions, remind all those present of the meeting's purpose, what outcome it is expected to deliver, and when it will end. If there are ground rules, state them straight away. Check that everybody has any relevant papers and that the agenda is approved. If there has been a previous meeting, minutes may need approval and discussion, but do not discuss anything that already features on the agenda. Instead, go straight into the first item, preferably calling upon another participant to initiate the discussion.

Conducting a Meeting

Strike a balance between keeping the discussion process moving briskly forward and ensuring that everyone who wants to speak has a chance to state their opinion. The custom of debating an issue until a decision is made can be time-consuming and lead to tension. To prevent this, act as a timekeeper (make sure you have a watch to hand). Set time limits to discussions so you can end the meeting at the appointed time.

> Make sure you stick to the time limit for each item on an agenda.

Closing a meeting

Allow yourself enough time for winding up a meeting. Summarize the discussion and check that others agree with your account. Make decisions about unfinished business, which may include nominating someone to deal with it, and, finally, run through the implementation of any decisions taken. These decisions determine the actions, which will be the result of the meeting. Assign each action to a person, and attach a time target for completion.

3.1.3.3 One to one Meetings

A meeting with a staff member can be formal or informal. Use one-to-one meetings to check performance and find out if coaching or counselling is needed.

Meeting formally

For formal one-to-one meetings the rules are the same as for any other meeting. Get to the point quickly, stick to the agenda, sum up at the end, and make sure that the other side agrees with the summary. In any one-to-one meeting the relationship between the supervisor and subordinate has a tendency to move into one of dominance and submission. To make meetings productive, listen to the other person, aim for rational discussion, and be courteous. Remember that a certain degree of confrontation may be perfectly healthy – and also unavoidable.

- ☐ Try to meet staff for formal one-to-one meetings at least monthly.
- ☐ Stick to an agenda, and make sure you agree on any decision.
- ☐ Remember to listen to what is being said, and do not dominate the meeting.

Being prepared

For regular meetings, preparation can make all the difference between a satisfactory or unsatisfactory outcome. Some companies stage one-to-ones between supervisors and subordinates every month to discuss any problems, define objectives, and deliver written performance reviews. For these one-to-ones, the supervisors distribute the reviews a few days beforehand. This preparation time gives the staff a chance to consider their response.

Coaching Staff

Good managers must be good coaches who know how to encourage staff to raise their performance at work, improve their knowledge, and realize their full potential. Coaching is inherent in the whole management process and should not be confined simply to performance reviews and annual appraisals. As a supervisor, take the initiative by setting staff goals, by regularly encouraging staff to achieve higher standards, and by discussing any strength or weaknesses. As the people being coached gain in confidence and performance, they will take on more responsibility for setting personal targets for improving at work.

> Listen to your staff. Coaching and counselling may provide solutions to discontent.

Counselling Staff

Problems that arise either from work or from personal life can be helped by counselling. But unless you are a trained counsellor or have considerable experience, leave this to a professional, who will help people to confront and resolve their problems. If an employee has become unhappy over a situation, offer to arrange a counselling interview, and be sympathetic. The counsellor will try to help the individual get to the root of any problem. Give practical support when you can.

3.1.4 Motivating people

3.1.4.1 What is Motivation

Defining Motivation

Motivation is the will to act. It was once assumed that motivation had to be injected from outside, but it is now understood that everyone is motivated by several differing forces. In the workplace, seek to influence your staff to align their own motivations with the needs of the organization. To release the full potential of employees, organizations are rapidly moving away from **"command and control"** and towards **"advise and consent"** as ways of motivating. This change of attitude began when employers recognized that rewarding good work is more effective than threatening punitive measures for bad work.

Motivating long term

Self-motivation is long-lasting. Inspire self-motivated staff furtherby trusting them to work on their own initiatives and encouraging them to take responsibility for entire tasks. Highly motivated individuals are vital to supply organizations with the new initiatives that are necessary in the competitive business world.

3.1.4.2 Recognizing Needs

Satisfying Basic Needs

A well-known psychologist developed a "two-factor" theory for motivation based on **"motivator"** and **"hygiene factors"**. Hygiene factors – basic human needs at work – do not motivate but failure to meet them causes dissatisfaction. These factors can be as seemingly trivial as parking space or as vital as sufficient holiday time, but the most important hygienic factor is finance. A manager should try to fulfil staff members' financial needs. People require certain pay levels to meet their needs, and slow income progression and ineffective incentives quickly demotivate. Fear about lack of security in a job also greatly demotivates staff.

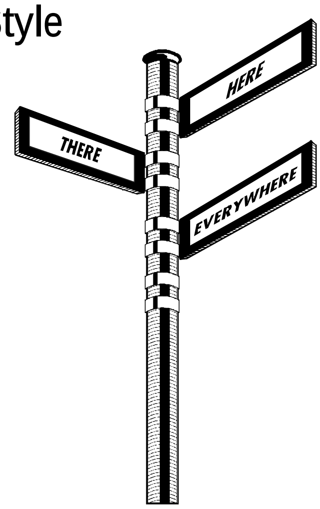
Ensuring Motivation

The second factor is a set of "motivators" that actually drive people to achieve. These are what a manager should aim to provide in order to maintain a satisfied workforce. How much a person enjoys achievements depends purely on its recognition. The ability to achieve, in turn, rests on having an enjoyable job and responsibility. The greater that responsibility, the more the individual can feel the satisfaction of advancement. Motivators are built around obtaining growth and "self-actualization" from tasks. You can raise motivation in your staff by increasing their resposibility, thereby "enriching" their jobs.

Heightening Workplace Motivation

MOTIVATORS	WHY THEY WORK
ACHIEVEMENT	Reaching or exceeding task objectives is particularly important because the "onwards-and-upwards" urge to achieve is a basic human drive. It is one of the most powerful motivators and a great source of satisfaction.
RECOGNITION	The acknowledgement of achievements by senior staff members is motivational because it helps to enhance self-esteem. For many staff members, recognition may be viewed as a reward itself.
JOB INTEREST	A job that provides positive, satisfying pleasure to individuals and groups will be a greater motivational force than a job that does not sustain interest. As far as possible, responsibilities should be matched to individuals' interest.
RESPONSIBILITY	The opportunity to exercise authority and power may demand leadership skills, risk-taking, decision-making, and self-direction, all of which raise self-esteem and are strong motivators.
ADVANCEMENT	Promotion, progress, and rising rewards for achievment are important here. Possibly the main motivator is the feeling that advancement is possible. Be honest about promotion prospects and the likely tirmescale involved.

3.1.4.3 Assessing your own Management Style



It is important that you understand your attitide towards your subordinates. Your thinking will be influenced by your experience, and will shape the way in which you behave towards all the people you meet.

Knowing your style

The forces that drive managers will strongly influence motivational behaviour. It is important, therefore, to understand your own assumptions and priorities, paying paritcular attention to your personal and corporate ambitions, so you can motivate others effectively. If you put your job first, you are probably highly motivated and know your career will benefit from success. Success is not just about meeting task objectives, but also about building an efficient, creative team that will succeed even in your absence. For this, a **"share-and-collaborate"** style may be more effective than an authoritarian **"command-and-control"** method.

Evaluating your Tendencies

Theorist Douglas McGregor defined two sets of management styles, which he labelled Theory X and Theory Y. Theory-X managers believe their staff respont mainly to the rewarding carrot and the disciplinary stick. Theory-Y managers believe their staff find work a source of satisfaction and will strive to do their very best at all times. Most people are not entirely X or Y, but fall somewhere in between. The X and Y theories apply not only to individuals but to organizations as well. Theory-X managers and habits will often be found in Theory-X organizations, and vice versa. Study the statements below to judge which of the theories best describes you and your organization.

THEORY X

- ☐ If I did not drive my people constantly, they would not get on with their work.
- ☐ I sometimes have to fire somebody or tongue-lash them to encourage others.
- ☐ Leaders have to lead by taking all key decisions themselves.
- ☐ I find that most people are unambitious and must be forced to raise their sights.
- ☐ I keep my distance from the team since it is necessary for effective command.

Managing by Theory X

A typical Theory-X manager is likely to keep away from his or her workforce much of the time. In fact, the only time the two meet is when orders or reprimands are to be given.

THEORY Y

- ☐ If somebody falls down on the job, I first ask myself what I did wrong.
- ☐ I should sometimes take a back seat at meetings and let others take the lead.
- ☐ If I ask someone for their opinion on an issue, I try to do as they suggest.
- ☐ People should appraise their bosses as well as be appraised by them.
- ☐ Anyone can have creative, innovative ideas if they are encouraged.

Managing by Theory Y

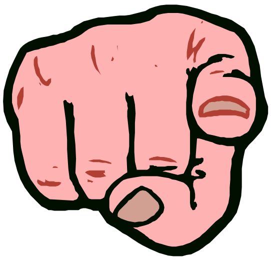
Collaborating with staff over decisions to be made, and getting feedback before implementing decisions, are traits that tend to be typical of a Theory-Y manager. This approach is often more motivating than that of Theory X.

Managing to Motivate

An essential foundation for motivation is a positive workplace environment created by you , the supervisor. Employees have the right to expect fair treatment and understanding. They also expect professional competence, part of which includes delegating tasks in order to increase staff members' self-management and participation.

Establish a system that is constructive – not obstructive – in which people can hope to perform at their best.

3.1.4.4 Creating a no-blame culture

Anyone with responsibility – including yourself – must accept their failures. However, to motivate effectivly you need a culture in which no blame is laid for failure. Errors should be recognized, then used to improve changes of future success.

Learning from mistakes

The lessons of failure are valuable, not only to the individuals involved, but also to the organization. Discuss the reasons for failure, so that you can eliminate them and strengthen the platform for success. Taking a constructive and sympathetic attitude to failure will motivate and encourage staff. If you choose to punish failure or motivate by fear, you will not create lasting success. Make it clear that tolerance of error has its limits. Repetition of the same error is inexcusable, since it shows failure to learn from mistakes.

> Repetition of the same error is inexcusable, since it shows failure to learn from mistakes.

Using action review

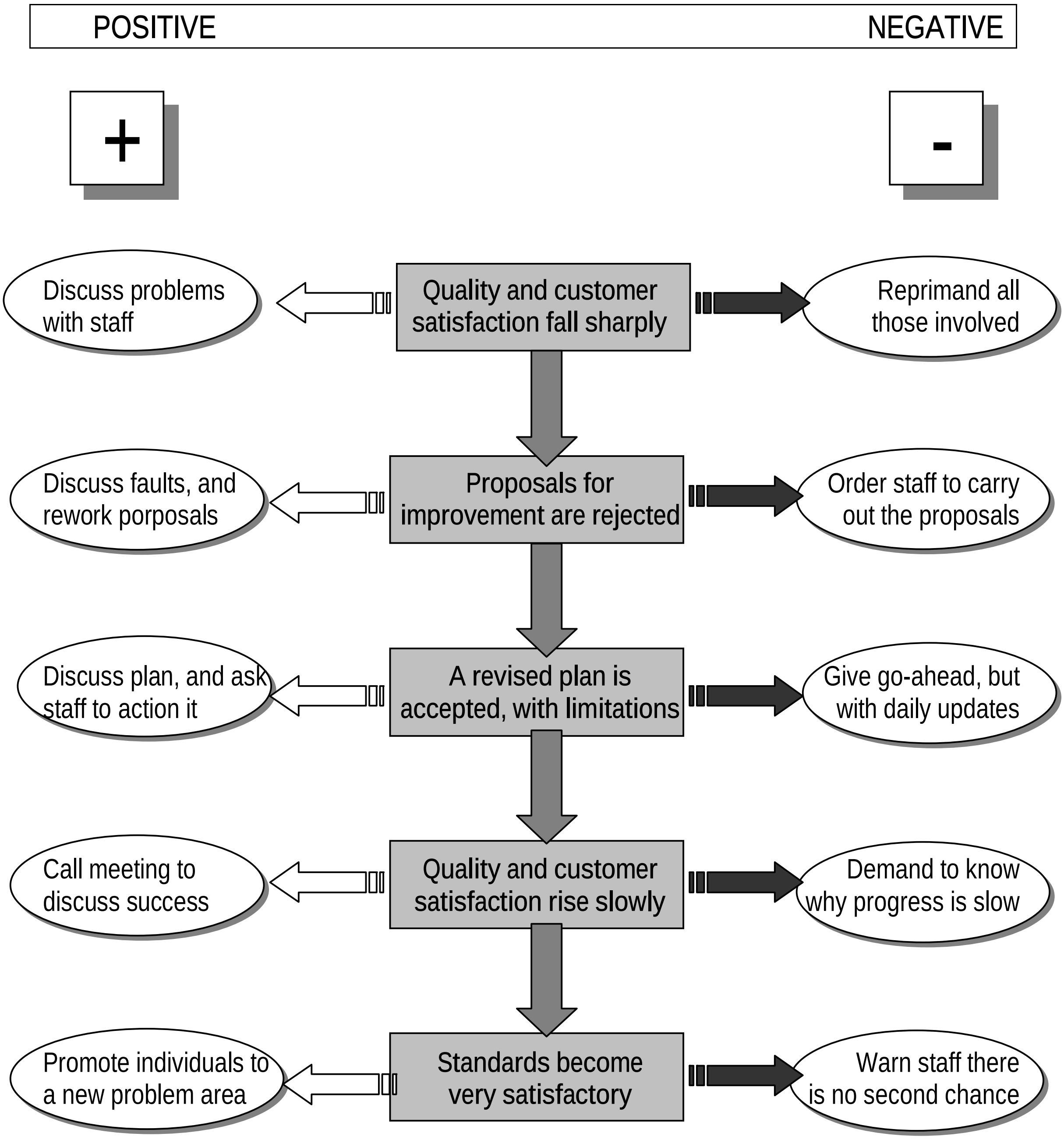
Action review is the process of systematically reviewing the success or failure on any project in order to learn from mistakes. The selected participants in the review agree on the lessons to be learned. These are put on record and circulated to everyone involved in the project, helping to establish what went right and what went wrong, and the reasons why. Use action review to inform staff what they should and should not do in futrue, and to spotlight the parts of the system that are in need to reform.

> Be firm but fair when you are drawing attention to error, and do not pull any punches.

Questions to ask yourself

- ☐ What precisely went wrong, when and where?
- ☐ What were the root causes of the failures?
- ☐ When were the deviations first signaled?
- ☐ Why were the warning signals not acted upon?
- ☐ What could have prevented the failures from occuring?

Solving problems without attributing blame



3.1.4.5 Winning Co-operation

The basic component of a motivational environment is co-operation, which you must give to your staff, as well as expect from them.

Helping Staff

Two key motivational questions to ask your staff are:

- ☐ "What do I do that stops you from doing a better job?"
- ☐ "What should I do to help you perform better?"

If you co-operate by acting on the answers, for example by investing in new tools or training if requested, you can bring about major improvements in motivation. Not acting on such feedback will demotivate. The prime objective is to **help staff to help themselves.**

Moving Control Levels

Levels of control vary from an insistence on checking and approving every action, to laissez-faire, in which people are free to perform as they wish and be judged only by the results. Increase motivation by moving towards less rather than more control. To do this, discuss and agree tasks, objectives, and methods beforehand, then allow the implementation to proceed independently, subject only to reports on progress and major deviations. In case of problems, do not blame, but consider potential remedies.

> Do remember that the best discipline is self-discipline.

Taking an overview

When analyzing staff motivation, stand back and look at the overall situation. Do not concentrate solely on one set of needs – wether they be team, individual, or task needs. Think about atmosphere, team complaints, and results achieved. Above all, ask a lot of questions – you will then form a picture of how the system operates and how well it works.

Using free incentives

Free or easy-to-supply incentives are a simple and essential way to win and maintain co-operation. Start by thanking people for a job well done, and follow this up with a written acknowledgement. It comes hard to many managers, but is an essential counterweight to criticism. Other ways to increase co-operation include acknowledging staff achievments publicly and holding specific meetings for the purpose of boosting morals. Be friendly and polite at all times – bad manners demotivate – and deal sympathetically with personal requests, such as time off for a special purpose. Play the helpful friend, not demanding employer, in these circumstances.

Working conditions

When we are talking about winning the co-operation of the workforce we should not forget about what the company should provide to create a proper working environment. A proper workplace shows the staff that you value them and will increase their co-operation. Ask yourself the following question about the workshop situation and try to improve until you reach the proposed conditions. Formulate similar questions for other workspaces such as packaging area, administration office, etc.

- ☐ A safe working space is compelling. Do they use in the machining section fences and guides, proper jigs and other safety equipment?
- ☐ Does the finishing section provides masks to keep the workers from inhaling fumes and dust?
- ☐ Is proper lighting be provided?
- ☐ Is the workshop floor out of concrete and are you able to use trolleys for the workshop internal transport?
- ☐ Is the workshop cleaned daily and as dust free as possible?
- ☐ Are the machines maintained regularly by a mechanic?
- ☐ Has the workshop a dust exhaust for the machines?
- ☐ Are the tools organized in a tool room and are they kept sharp all the time?
- ☐ Does the company provide good quality raw materials or is it the cheapest available?
- ☐ Is there an existing production administration system implemented? Do you use Routing Sheets, Cutting Lists, Drawings, and Samples to speed up the production?

Asking for suggestions

The result from one survey showed that in the typical company only 4 per cent of the ideas for improvement ever reach the top. Do not let that happen. Invite suggestions via a suggestive box, or hold brainstorming meetings. Respond positively to all volunteered ideas. Use marketing devices such as "Idea of the month" to recongnize and encourage good contributions. If at all possible, accept each suggestion, even if it must be modified. If you must reject any ideas, explain to the staff why – and do it with sincere regret.

Using Individual Efficiency Projects

When you find a suggestion that you are keen to implement, allow the person from whom it came to see it through to fruition. The idea behind this action is that the staff member whose suggestion it was is likely to have the most enthusiasm for it and be very motivated to ensure that it is a success. He or she should be free to delegate the whole task or any of its parts, but it remains their responsibility. Use this as one of your chief motivating factors when requesting suggestions from your staff and you are likely to be much encouraged by the increased enthusiasm that will result.

3.1.4.6 Dealing with Demotivation

The course of people management seldom runs smooth, and emotions often run high on both sides of the process. The most valuable technique you can use for preventing demotivation is a sympathetic and understanding human response.

Identifying causes

Demotivation must first be analyzed before you can do anything about it. It may be caused by stress, emotional problems, or physical illness. Alternatively, there may be something wrong with the job itself, or with the person's approach to it. Talk to the demotivated person in order to identify where the problem lies, and tailor the remedy to the cause, for example by arranging secretarial help for someone who is overworked.

Tackling Problems

Personal difficulties and workplace problems are both potential causes of demotivation at work. Never ignore your staff's emotional strains, even if performance is going well, because there is a high probability that the personal troubles will eventually affect work. Your first responsibility must be to the job. At the same time, you must also look after the individual. Approach emotional upsets in the same way as workplace difficulties. First, get the problem clearly defined, then seek the root cause. See if there is a solution that the individual will accept. If so, act upon it. It is important not to let the situation worsen. If you are unable to provide enough help, make sure that you find someone who can.

Encouraging Teamwork

When team members of your staff seem to be constantly at loggerheads, masterly tact is usually required to replace the element of confrontation with collaboration. One course of action is to move the couple into a larger team, insisting that they co-operate with and not ignore each other. Another approach is to have the two people swap roles for a while, so that they can gain an understanding of each other's workload. If all else fails, separate the two warring parties permanently to avoid disrupting the work of the entire team.

3.1.5 Discipline

3.1.5.1 Rules and regulations

The "Rules and Regulations" of your company is a very important tool to keep up work discipline. When you start your job as a supervisor, get a copy of the rules and regulations and read them carefully! Go to the staff department and discuss the contents and the routines with the responsible managers. Sit down and “translate” them into terms the workers can easily understand. Conduct a meeting with the workers and explain the rules and the consequences of possible misbehavior. Clarify with the workers that once they sign the working contract with the company, both parties agree to certain terms, which should be binding for both parties.

Give them examples!

How much money does it cost the company if
50 workers come 30 minutes late 20 days a month at an average salary of 150 Peso/day?

8 hours x 60 minutes = 480 minutes a day
150 Peso / 480 minutes = 0.3 Peso / minute

0.3 Peso / minute x 30 minutes late x 20 days / month x 50 workers = 9000 Pesos / month

Productivity is lower because the attendance per day is only 94 % instead of 100 %.

3.1.5.2 Disciplinary Action

Check with the staff department on implementation guidelines and forms for disciplinary action. Keep written proof of misbehavior. Ask the worker for a one on one discussion and:

- Describe the performance problems and review past discussions and reminders
- Ask for reasons for the situation and listen openly to the employee's response (do not get involved too deeply into personal problems because you will loose your objective position).
- Indicate what kind of disciplinary action you must take, and explain why
- Discuss and agree on ways to improve the workers performance and set a follow - up date
- Ask the employee to summarize the discussion in order to find out whether he takes the situation seriously and whether he understood the problems
- Indicate your confidence in the employee's ability to improve and give hints on how to do so.

Your role as a supervisor is to be a **mediator** between the workforce and the management. You have to stay objective. Leave personal emotions out of a meeting like that.

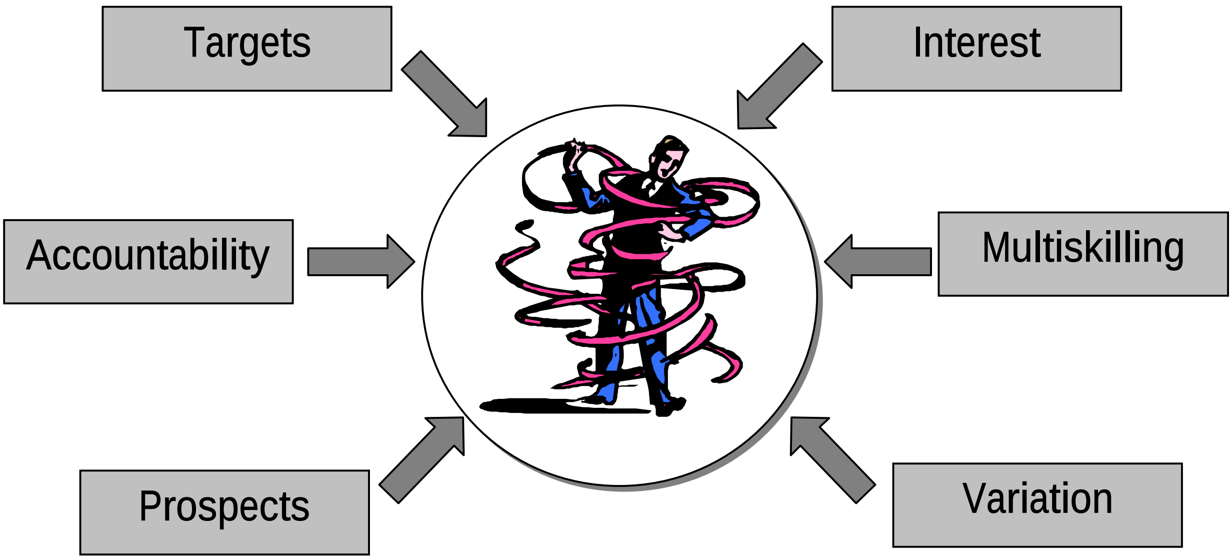
3.1.6 Rewarding performance

3.1.6.1 Evaluating each job

Before you can start to evaluate the performance of somebody in a job, you have to find out about the features of the job and if these features are still appropriate. Conduct a thorough evaluation of all aspects of each job and the way you measure performance before you start appraisals.

Defining performance

Every job has its own skills, necessary knowledge, and attributes, so be sure to know and to specify them. Whatever level of job you are looking at, it should be of interest and give satisfaction to the worker. Including the factors below will help to make any post more appealing in the long term and motivate the job holder to perform more effectively. Check each job if the different areas are covered or if you have to make adjustments.



Another part of the process of evaluating an exsisting job involves looking at past performance levels and deciding what new qualities or tasks are needed to improve them. Arriving at a single measure of performance is difficult. Financial results are the best all-inclusive measure, but do not rely solely on them, since they will convey the wrong message – that only profit counts. To measure quality, rather than just quantity, include staff morale, customer satisfaction, inter-team collaboration, and other specific areas.

Using grading systems

Your organization may run its job and reward system in a rigid, graded way. And you may be in a situation where almost all of the factors are outside of your control. If that is the case, make the most of the rewards that you are able to distribute. If you are in a position to make such decisions, remember that grading jobs and their occupants, and assigning to each grade a salary band may be useful. Aim to keep the number of grades as small as possible, the pay bands as wide as possible, and the importance to staff of the grading system as low as possible.

Regard grading systems with caution – not as sacred.

Putting the job first

The key point to remember when evaluating jobs is that the job is more important than the grade, which is merely an administrative convenience. The lure of rising one or two grades may well be motivational, but rules for how many grades staff can advance at any one time, or stating that "a lower grade cannot be the manager of a higher grade" are nonsensical and unnecessary. Get the right person for the right job, and make it clear that the grade goes with the job, not vice versa.

3.1.6.2 Appraising effectively

The true objective of appraisal systems is not to blame, reward, or praise, but to develop. In some progressive organizations, the appraisal is not labelled as such, but is called a "personal development plan" or something similar. Conduct your appraisals properly, and you will help people to form an objective view of their past performance. More importantly, you will also be equipped to encourage better staff performance as well as to enable and assist the interviewee to take on greater responsibility in the future.

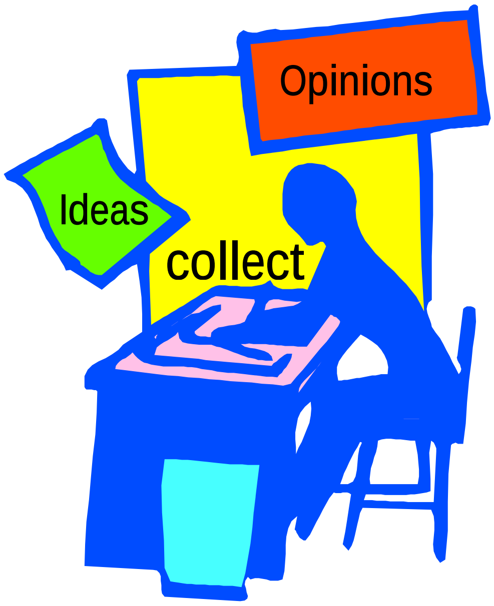
Discussing weaknesses

In appraisals, emphasize what the people being appraised have done well – their strength. You must, of course, also remark on and discuss their weaknesses, but only for improvement´s sake. Eliminating weaknesses strengthens performance. It is not just staff performance that should be discussed. How does the person being appraised perceive the contribution of the appraiser? Has the supervisor been helpful and motivating throughout the year? If not, the appraiser has just as great a responsibility to improve performance as the others.

Questions to ask your staff

- ☐ Can I do anything to help you to perform better?
- ☐ Am I doing anything that hinders your performance?
- ☐ What do you see as your key strengths and weaknesses?
- ☐ Have you any ideas about how you can improve or develop yourself as a team member?
- ☐ How could your job or the system be improved?

Listening to opinions



Appraisal interviews provide a chance to talk widely over external and internal matters, so do not confine them to issues of personal performance. Remember that all employees are sources of ideas and opinions. Discuss these throughout the year, not just at appraisals. Note the ideas and opinions that you think the company could benefit from, and consider implementation. The appraisal is ideal for constructive question-and-answer sessions, and you, as the suppervisor and appraiser, should do more listening than talking.

Following-up after appraisals

The fact that formal appraisals tend to take place annually does not mean that appraisal is a once-a-year-only process. In particular, the formal appraisal contains elements that need to be followed up more regularly – perhaps monthly or quarterly. For instance, if a weakness was diagnosed, and training followed, has this been effective? Is the person now confident with that element of his or her job, and able to use the new-found knowledge effectively at work? Follow up any interpersonal problems on a quarterly basis. Such follow-up is essential for maintaining the high level of motivation that the appraisal should have triggered. If an appraisal did not motivate, use the follow-up to find out why, and how to get better results.

Developing ability

Write a list of the key qualities that are needed for a particular task, and assess how they match the qualities of the jobholder. If you feel there is a mismatch – especially one that is likely to cause demotivation – do not reallocate the task, but take immediate action to develop the missing attributes. Abilities are learned, and rarely inborn. In almost every case it is possible to be taught a necessary skill, and where abilities are weak they can nearly always be developed. If you feel certain qualities need to be acquired, be sure to provide the training.

Evaluate strengths and weaknesses → Ensure job makes full use of strengths → Provide training to improve weaknesses

3.1.6.3 Rewarding exceptional performance

Defining exceptional performance

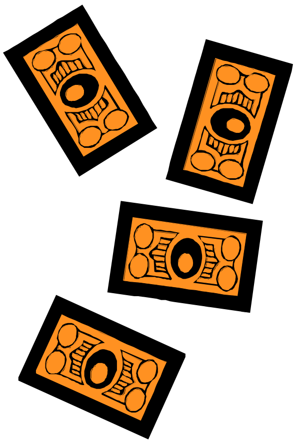
The term "exceptional performance" is not a fixed, scientific measure. It varies from task to task, and job to job. As a supervisor, it is important that you recognize and reward what you consider to be genuinely exceptional. To do this, carefully work out, and fix solidly, the levels at which both financial and non-financial rewards are triggered off. Seek to ensure not only that good work gets good rewards, but also that top standards are not so high as to be impossible to achieve.

Offering non-financial rewards

Achievement is its own reward – but it is never enough. Achievers also want recognition. Even a simple "thank you" is an important, underused reward that costs nothing. Staff also value inclusion in events like away-days to discuss company strategy. Such events fit into development programes that are central to sustaining job satisfaction, increasing responsibility, and enhancing career progress and personal growth. Other non-financial rewards such as gifts and holidays may prove cheaper than cash rewards – and everyone loves to receive presents. However, these provide less motivation than individual recognition, and are not substitutes for good, year-round management.

Considering non-financial rewards

REWARD	FACTS TO CONSIDER
RECOGNITION Handwritten note, engraved trophy	An often overlooked form of reward that is personal as well as being effective in both the short and the long term.
GIFTS AND PRIVILEGES Holidays, sports facilities, merchandise	Immediate, and stimulating in the short term. May not meet long-term motivational needs.
SPECIAL EVENTS Weekends away, parties, gatherings	Involve staff from all levels. Can stimulate, relax, bond, and motivate staff.
PROFESSIONAL TRAINING On- or off-site courses	Effective, focused training brings high returns. Company gains a qualified employee, who feels valued.
SELF-DEVELOPMENT Personal, non-vocational training	Very high motivational value. Enhancing self-image raises performance level at work.
EQUIPMENT Company car, lap-top computer	Expensive equipment is highly motivational. Need to ensure that equipment is fully utilized.



Offering cash rewards

Use rewards in the form of pay increases or financial benefits to recognize achievement, prevent a high-flying staff member from leaving the company, or encourage an individual to take a greater level of responsibility in his or her job. Remember, however, that this type of reward often has only short-term motivational value. It can also lead to resentment among other staff members, and discourage interaction within a team.

Considering financial rewards

REWARD	FACTS TO CONSIDER
SALARY INCREASES Increases in basic rate of pay	Money is a powerful short-term motivator: the bigger the rise the higher the motivation. The impact wears off relatively quickly.
COMMISSIONS AND BONUSES One-off payments linked to targets	Increases motivation and job satisfaction. There can be difficulties in fixing rates and relating these rewards to base pay.
PERFORMANCE RELATED PAY Regular wage increases based on target-linked performance	Is motivational and can be a tax-effective incentive. There may be a delay between earning and receiving PRP, therefore weakening its impact.
SHARES/STOCK OPTIONS Gifts of shares, or the chance to buy shares at a fraction of actual value	Encourages long-term loyalty and sense of involvement. Reward is not immediate, and initial benefit may be small.
SPECIAL RATES Help with mortgage/rent, insurance, and other items.	Has considerable staff-retention value and can act as "golden handcuffs". Has low motivational value.
FAMILY HEALTH BENEFITS Paid or subsidized schemes offering privat family health care	It is in an organization's interest to have healthy staff. Has low motivational value as healthcare provision is increasingly expected from companies.

Celebrating success

Personal thanks for exceptional performance are powerfully reinforced by being repeated or given at a public celebration. Celebrate success, and you can motivate everybody in the unit, not just the achiever. External awards and dinners have proliferated, and few industries are now without them. Pay for entries and tables at these events, and make a fuss of any winners. The same format applied internally is also effective. If a whole team, rather than an individual, is involved, celebration is highly appropriate. Parties give you the chance to motivate by words and by singling out special contributions. Ensure that any event of this type is carefully planned and well staged. Skimping on any element, especiallly on catering, is a false economy in terms of motivation.

3.1.7 Training and developing the staff

3.1.7.1 The importance of training

Training helps to improve the technical skills of team members and develop the managerial and interpersonal relations within a unit. Review and upgrade the skills of a unit constantly to meet current and future challenges successfully.

Assessing costs

Despite the expense involved in training, it is cheaper than the cost of persisting without it, which will damaging the performance. Calculate the costs of training, including training staff, materials, room hire, course fees, subsistence, travel, and loss of work hours. Weigh up these costs against the expected financial gains and improvements evident in team performance following training.

Training unit members

When trying to optimize the various skills in a unit, involve the whole unit/team in planning its own development. The aim is to reinforce the strengths and eliminate the weaknesses of all the unit members, and develop those skills necessary to seize future opportunities and see off any threats. Discuss these aims with the whole team, draw up a training plan, and work out with each individual what his or her own needs are now and what will benefit projects and the unit as a whole in the future. It is ineffective and demoralizing to delegate a task to someone who lacks the necessary skills. Never place people in new or changed roles without first providing the training they need, and always keep the option of further training available. Always build delegation on a foundation of on-going training at all levels so that suitably qualified people will be available whenever you need them.

> Listen to the feedback given by trainees about training courses.

Training leaders

As a supervisor, you should be exemplifying the qualities necessary to manage a unit/team successfully. Ensure that you receive the requisite training to develop prioritizing, process-chasing, delgation, and motivating skills. Make these an integral part of your personal development plan, and ensure that unit members – especially your sub-leaders – also develop their own leadership skills. Listening carefully, criticizing constructtively, being tolerant of error while correcting mistakes, and retaining objectivity are leadership qualities that members should use within a team and in future projects.

> Set an example to your staff by being trained yourself.

3.1.7.2 Developing a training plan

Since you want to get the best out of your staff you should think about training and developing them in a structured and planned way. You as a supervisor can not do it alone, you need the co-operation of the HRD department and the top management. Formulate well planned proposals and emphasize on the advantages of a successful training program.

Informal training

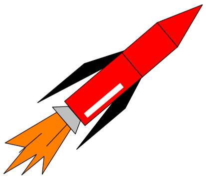
You can develop your staff in informal training, meaning to say you train them within the production while you assign a job to them. This training has the advantage that you can take care of each worker by himself. On the other hand communication is not so easy because of the noise in the workshop. Mostly you will only have time to show him HOW something works but not WHY. When it comes to the next assignment you might have to start from zero again. To avoid this, you have to use a specific training method that assures a good and long-term training effect. We call the method the Four-Step Method, which will be explained in the following chapter.

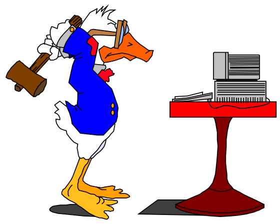
Formal training

On the long run your staff development will be more efficient if you try to introduce some formal training to your department / company. A formal training will be done either through you or part of your more experienced staff in a planned and organized schedule or mostly through other training institutions.

- ☐ Before you can actually start with a formal training, you should evaluate the staffs strengths and weaknesses in order to know WHAT you should teach them.
- ☐ Try to classify the staff in each training relevant area into three different skills levels (Beginner, Advanced, Experienced) and make training plans according to these results.
- ☐ Talk to the HRD department and the management about time and a room to conduct some of this formal training for the three different levels on a Saturday or as evening classes.
- ☐ Do not put all staff members into one class because the experienced ones will be bored and the beginners will be overcharged and can not follow your explanations.
- ☐ Accompany the theoretical lectures with some hands-on practices in a quiet workshop.
- ☐ Try to convince the HRD department to introduce a company internal grading and certification system. At the end of a “Circular Saw Training Module” the worker should undergo a hands on exam and if he passes should receive a certificate as a “Circular Saw Operator”. This system should be accompanied as well by some incentives, workers who undergo these training and take them seriously should be acknowledged. Try to convince somebody from the management to hand out the certificates to stress the importance of the program.
- ☐ Make a Manpower Development Plan with HRD to send some staff members to Training Centers, especially if you do not have time and facilities to conduct training in your own company.
- ☐ Be serious about the training and explain it to your staff according to that. While courses are conducted, discipline, attendance and active participation should be valued very high

3.1.7.3 Effective teaching with the 4-step method






1. 2. 3. 4.

The informal training in a company to teach technical or handicraft skills of any kind should be done in an appropriate way to ensure a successful impact. There is a special method for this kind of teaching that was developed by taking into consideration the principle of learning of the human being. This method is taught in Germany and many other countries to mastercraftsmen to equip them with a proper knowledge to teach effectively and successfully. You have to break down each working process in very small steps and make a kind of work analysis that will help you to apply the four-step method. You find a form for the work analysis on page 47.

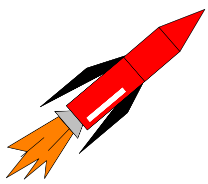
The four-step method

Learning is not only done by explanation but also by imitation, repetition and exercise. To manifest the learned topic in the long term memory you have to concentrate on all of these parts to assure a positive result. The four steps are the following:

1. Step: Preparation of the trainee
2. Step: Demonstration and explanation
3. Step: Trainee activity
4. Step: Exercising and strengthening

<u>1. Step: Preparation of the trainee</u>

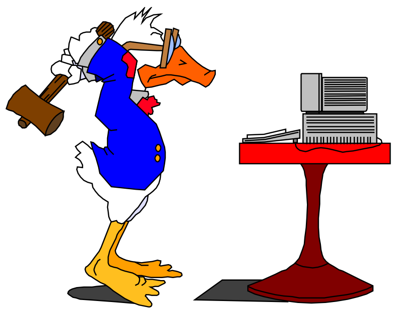
➔ Take the shyness
➔ Motivate
➔ Show the ovjectives and tasks
➔ Evaluate the knowledge
➔ Familiarize with the working place
➔ Give advices concerning safety



2. Step: Demonstration and explanation

- ➔ Place the trainee so that he is standing in the same direction to the workpiece than you.
- ➔ Demonstrate the whole procedure in the original time.
- ➔ In case of complicated procedures devide them into modules and teach them step by step.
- ➔ Repeat the demonstration and make the single steps visible
- ➔ Say **what** you are doing, **how** and **why** you are doing it in that way.
- ➔ Give the opportunity to ask questions.

3. Step: Trainee activity



- ➔ Enhance the trainee to try it on his/her own.
- ➔ Don't interrupt the trainee in his/her first attempts.
- ➔ Make comments on serious mistakes.
- ➔ Precision is more important than speed.
- ➔ Let the trainee say **what** he/she is doing, **how** and **why**.

4. Step: Exercising and strengthening

- ➔ Give enough time to exercise.
- ➔ Acknowledge progress.
- ➔ Control that no mistakes are done during the process.
- ➔ Change the conditions of exercising.
- ➔ Slowly adapt to real working conditions.

How to break down a working process

Scheme of a work analysis

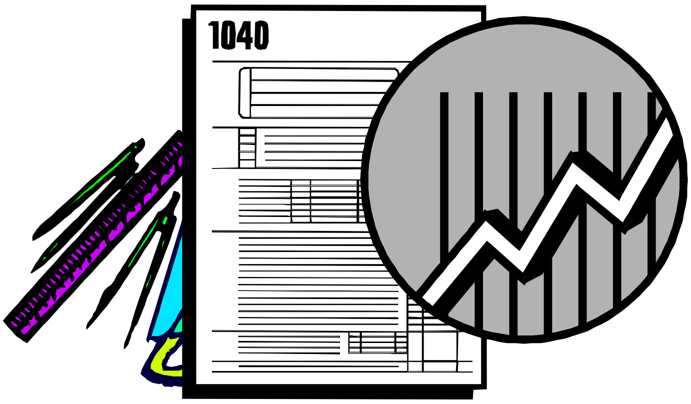
Workprocess:

Tools required:

No.:	Work Steps WHAT?	Explanation of process HOW?	Reasons WHY?
01.			
02.			
03.			
04.			
05.			
06.			
07.			
0.8			

3.2 Analysis Skills

3.2.1 Planning a process



3.2.1.1 Determination of goals
3.2.1.2 Plan the accomplishment
3.2.1.3 Development of plans and actions
3.2.1.4 Controlling and review procedures

3.2.1.1 Determination of goals

Before we can start with the planning of the production we have to determine the goals we want to achieve. Normally you will do that first with the management, most of the time they will give you the production numbers (goals) to achieve in one day, week, month. Study the given information like technical drawings, bill of materials, etc. carefully.

You have to consider some aspects for the determination of your goals:

Output of the production	=	number of items to produce in specific time
Quality and workmanship	=	determine the quality of the product in relation to the time available and the requirements of the customer
Cost and Budget control	=	consider the costing when you produce an item, production time and quality are relevant

Clarify these aspects before you start your production planning in order to achieve the right output before the deadline, in the right quality and within the cost frame.

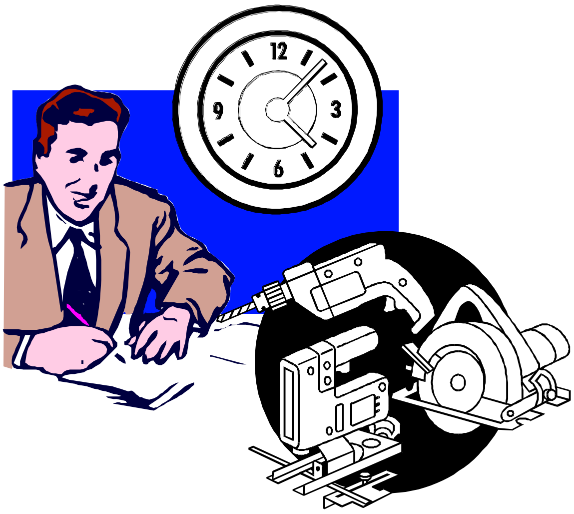
3.2.1.2 Plan the accomplishment

Now that we have predetermined the goals to achieve we have to ask: “How can we achieve these goals?”
You have to think about some given facts before you can continue:

- How many skilled workers do I have to do the job?
- Which machines / tools are suitable for the job and are they available at that time?
- Which jigs are necessary and are they available or do you have to prepare them?
- Are the right materials available / prepared for the job? (Contact Lumberyard, Machining)
- In a small company you even might have to do the costing, so you need the necessary data like material prices, available dimensions and machine hour rates.

With this information and the drawing etc. you are able to start the planning of the production for the next period. Discuss it again with the manager if the production goal is too high, be specific, have facts and numbers when you talk to him.

3.2.1.3 Development of Plans and Actions

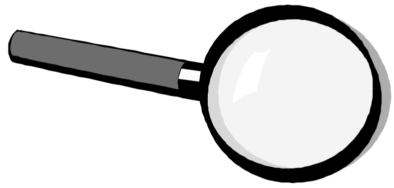


The implementing stage
After you gathered all the data, you should be able to proceed with your planning to the implementing stage. You have to prepare for example routing sheets where all the **processes** for a certain work piece are described. You state as well the **equipment** used for each process, plus the **estimated time** for the process. Depending on your system you can determine the workers on the routing sheet as well. This way it is easy to utilize the manpower properly and you can inform the workers easily about their daily duties.

The use of a production plan
In a normal workshop you do not have only one order at a time but maybe three to four, so you have to make a production plan in order to coordinate the different orders with each other because they have different deadlines, materials, need different equipment and manpower. You are the one who has to know at which stage each order is. This production plan can help you when you have to consider changes in your production line and the timing of deadlines. A proper production plan makes the discussion with the management much easier. When you start making a production plan, try to incorporate your best workers into this process because they have the most practical experience and good judgement. Try to update the production plan daily to make the most use of it. Check for “bottle necks” in your production line, machines like circular saw and spindle molders are often overloaded with work and the whole production line has to slow down because of one machine. Try to think of alternatives like: second shift for special equipment, different production processes where different equipment is used, more manpower in certain sections.

3.2.1.4 Controlling and Review Procedures

Controlling is the work a supervisor performs to assess and regulate work in progress and to assess the results secured. In order to do so, we have to be able to establish some activities to analyze this progress:



Setting Performance Standards

Before we can actually evaluate performance we have to set some standards and criterias to be able to do so. (Example: 2500 Table legs, Model # 23432 in 100 hours production time in the quality of the sample given to the customer). Try to set a **quality standard** for each specific product. This is especially true if you were sending a sample to the customer. Once the customer accepted the sample, you have to keep this quality standard and you can not send him products with a lower standard. If you have a **Quality Control Department** in your company, try to work together with them, so that you know all the quality factors before you start the production of the item.

Measuring Performance

After setting the standards we can now record the results of the worker or production line. (After 50 hours production time, only 500 legs are finished, quality is lower than the sample).

Evaluating Performance

Now that we have our actual production results, we can compare them with the standards from before and we will find out whether we reached our production goals or not. (Evaluation compares standards with results: 500 legs finished after 50 hours = lower than the standard, quality is not as good as sample = lower than standard).

Taking Corrective Action

You have to take corrective action especially if you do not reach your production goals, meaning your production is too slow, the quality too low, etc.. Controlling and review procedures are essential for the implementation of plans. Without them you will never be able to tell whether you could accomplish the goals or not. The above mentioned production plan is already one very important tool for controlling because you can follow the production process on it and you can identify bottle necks and other problems.

How can you make your production faster?

- ➔ Training of workers
- ➔ Better machines and equipment
- ➔ Use of jigs
- ➔ Identify bottleneck in the production
- ➔ Allocate materials for each order right in time

If you are involved in costing, establish a proper **post calculation process** in order to check on the accuracy of your costing. Check on the **physical accomplishments** (number of work pieces, in specific time, in a certain quality) of the workers, it is an important thing to know about the efficiency of each single person in the production line. The easiest way is to evaluate a worker's data from his punsh card and the routing sheets.

3.2.2 Improving a process

3.2.2.1 The principle of continuous improvement

Usually you look for a problematic area in your production to improve the working process. When the cause of a problem has been identified, and a "cure" found, it must be implemented and evaluated once again, to confirm that the solution is working. If not, the analysis starts once again. But if the cure was the right one and the problem was solved you stop thinking about it and consider it as a solved problem. That was the traditional way of handling situations like that. If you want to implement the idea of "continuous improvement" in the company your way of thinking has to change.

Reasons to implement
You might ask, if a problem has been fixed, why can't it be checked off the list of things to correct, and fogotten about? Because nothing is static: suppliers may change some aspect of their materials; equipment may develop problems that, however slight, affect output; technology may be upgraded, requiring new and different training, and so on. A modern company which considers Total Quality Management (TQM) should allow for this **ongoing cycle of continuous quality improvement**, a concept that Japan has been using for a long time but which is still quite a revolutionary idea to most western organisations.

Learning from the Japanese
The principle behind the continuous improvement is **Kaizen**, a Japanes term which can be translated:
#

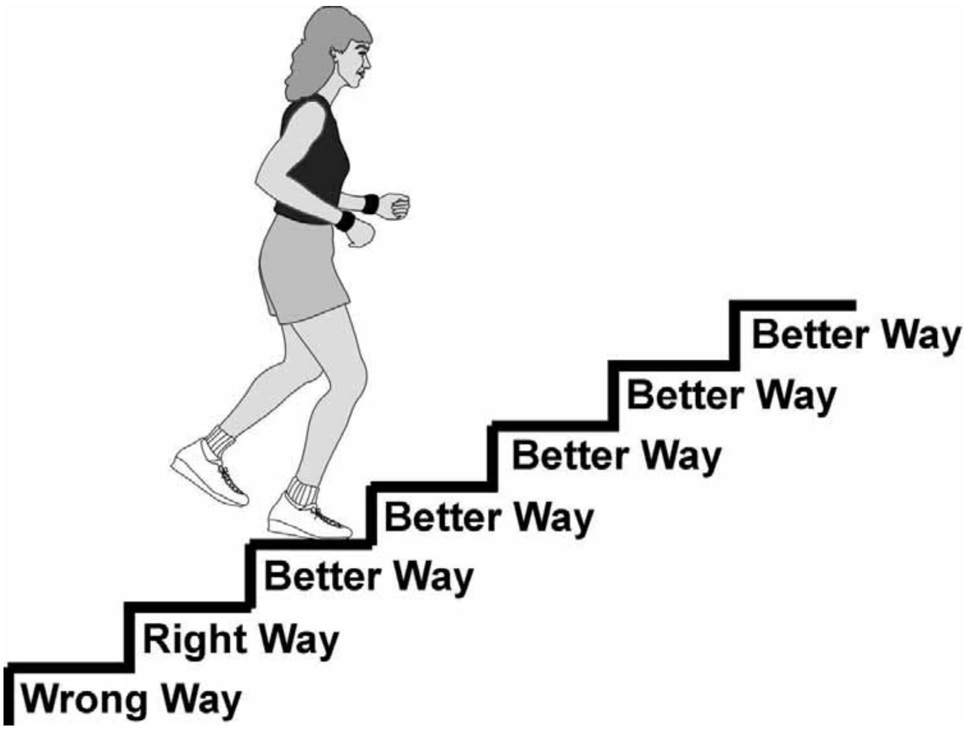
Kai = change
Zen = good

Kaizen means improvement. Moreover it means continuing improvement in personal life, home life, social life, and working life. When applied to the workplace Kaizen means continuing improvement involving everyone - managers and workers alike.

Kaizen can be stated the following:

- "In its broadest sense, quality is anything that can be improved."
- "There is <u>always</u> a better way."
- "There is <u>no</u> acceptable best way."

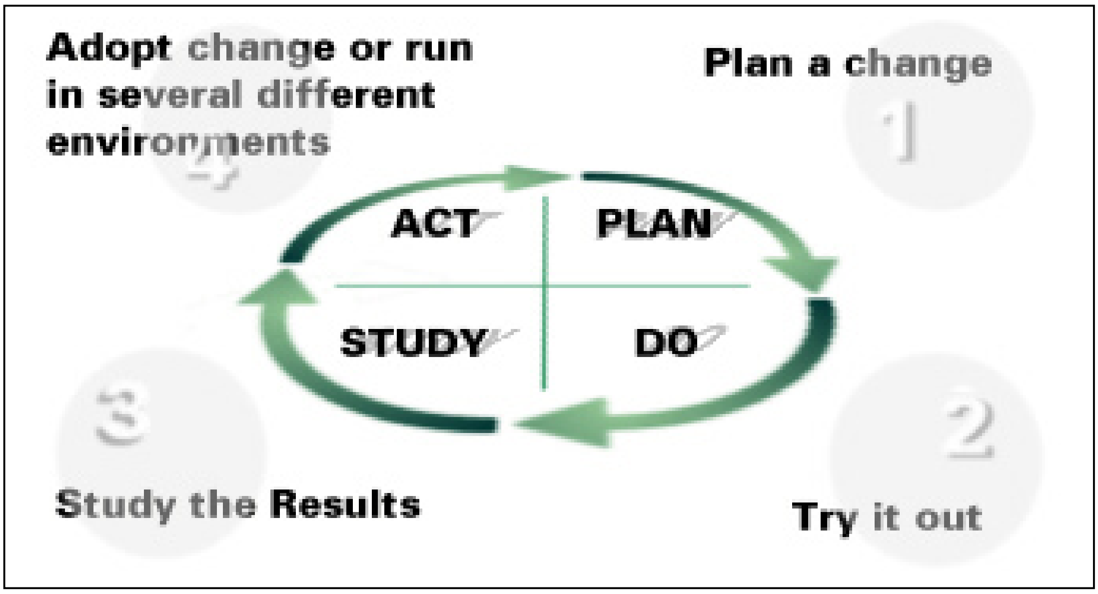
It is through Kaizen that the processes which bring forth or sustain the product are made more competitive. If customer satisfaction (the larger the better) and cost (the smaller the better) are choosen as the primary quality characteristics, then the focus of workplace Kaizen is to improve value, and hence competitive advantage. Total Quality Control is the system to implement Kaizen.



3.2.2.2 The process of continuous improvement

The Deming Wheel

The process of continuous improvement, called PDSA or, alternatively, PDCA (Plan/Do/Study or Check/Act), is often referred to as the *Deming Wheel*. The impact of Dr. Deming's teachings on American manufacturing and service organizations has been profound. He led a sweeping quality revolution that is improving the competitive position of the United States. Dr. Deming himself called the cyle the *Shewhart Cycle* (after its inventor, Dr. Walter Shewhart, a statistician and author of Statistical Methods from the Viewpoint of Quality Control), illustrated below:



Continuous improvement focuses on examining the processes in an operation, to learn where mistakes are being made, why they are happening and if it is possible, practical and economically desirable to prevent them from recurring. Inspection has its place in this practice, but it is inspection of the process, not the product -- a principle in line with Dr. Deming's teachings.

So how do you improve a process?

1. **First, you need to recognize the problem**
   The recognition of a problem may come from internal (worker) or external (supplier/customer) sources. Both sources are invaluable, but unfortunately not all organisations provide feedback opportunities. Identify a problem area or the opportunity for improvement, the reason for working on it, and an indicator- with an emphasis on the customer-for measuring improvement.

2. Define and identify the problem

Then the process giving rise to the problem has, likewise, to be identified and documented. *Flow charts* often prove to be the most useful form of documentation, as they are geared to breaking any operational process down to its nuts and bolts. Break down the problem area to determine its subparts, identify the components with the most impact on the customer, clarify the problem statement, and set a target for improvement.

3. Measure and analyse the performance

Once a process has been documented, its performance can be measured and analysed. There are a number of methods available to do this, but the method used will be determined by both the type of measurements being taken and what is being analysed. Evaluate the information gathered, and identify and verify the root causes of the problem. Utilize cause and effect analysis and the questions, "What causes this?" and "Why does this condition exist?" to eliminate the problem's symptoms and identify the underlying or root cause.

4. Find a solution for the problem

Identify and select the proposed solutions or countermeasures to correct the root cause of the problem identified and verified in step 3. Evaluate potential countermeasures for effectiveness and feasibility, and support the one chosen for implementation with appropriate data such as cost-benefit analysis, barrier/aid identification, and an action plan to assure any barriers are overcome.

5. Implement and evaluate

Confirm that the problem and its root causes have been identified, countermeasures implemented, and the problem decreased and the target for improvement met. Assure that once a problem and its root causes have been identified and countermeasures implemented, the problem doesn't reoccur. Once the data obtained confirm that the countermeasures have been successful, the improvement can be standardized, using control charts and/or standards or procedures. Replication should be utilized where the results are successful and can be shared with other areas doing similar work.

6. Evaluate

Decide what will be done with any future problems, evaluate the team's effectiveness and lessons learned, and develop an action plan for remaining problems. This step identifies the Deming Wheel as a tool, which should continue to be used to evaluate the problem and any changes in circumstances. By continually turning the wheel, adjustments can be made as circumstances change.

3.2.2.3 Case study: Shortening customers'telephone waiting time

This is the story of a Quality Control program that was implemented in the main office of a large bank. An average of 500 customers call this office every day. Surveys indicated that the callers tended to become irritated if the phone rang more than five times before it was answered, and often would not call the company again. In contrast, a prompt answer after just two rings reassured the customers and made them feel more comfortable doing business by phone.

1. **Selection of a Theme.**
   Telephone reception was chosen as a QC theme for the following reasons: (1) Telephone reception is the first impression a customer receives from the company, (2) this theme coincided with the company's telephone reception slogan, "Don't make customers wait, and avoid needless switching from extension to extension", and (3) it also coincided with a company-wide campaign being promoted at that time which advocated being friendly to everyone one met.

   First, the staff discussed why the present method of answering calls made callers wait. Figure 3.1 illustrates a frequent situation, where a call from customer B comes in while the operator is talking with customer A. Let's see why the customer has to wait.

   At (1), the operator receives a call from the customer but, due to lack of experience, does not know where to connect the call. At (2), the receiving party cannot answer the phone quickly, perhaps because he is unavailable, and nobody can take the call for him. The result is that the operator must transfer the call to another extension while apologizing for the delay.

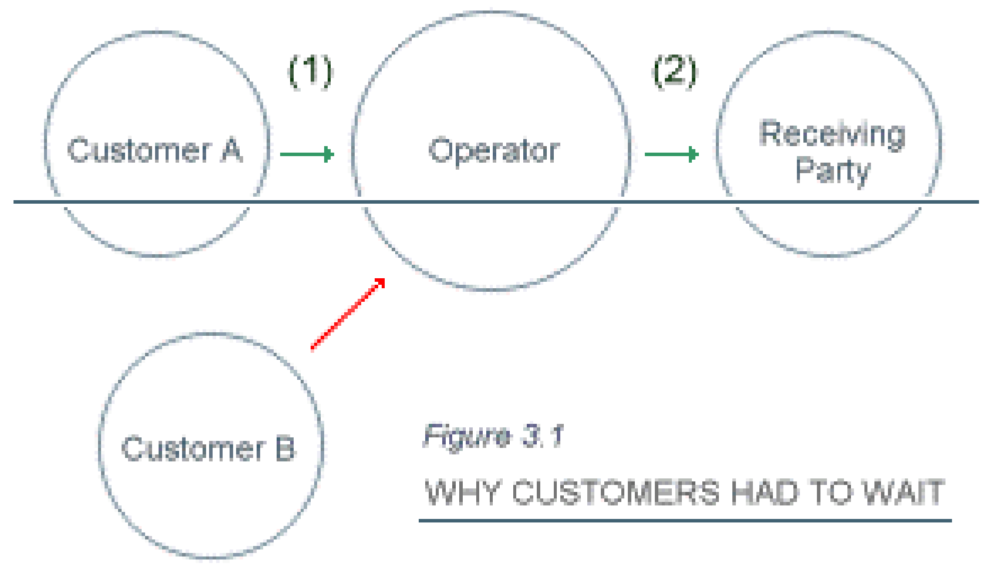


Figure 3.1
WHY CUSTOMERS HAD TO WAIT

2. **Cause and Effect Diagram and Situation Analysis**
In order to fully understand the situation, the circle members decided to conduct a survey regarding the callers who waited for more than five rings. Circle members itemised factors at a brainstorming discussion and arranged them in a cause-and-effect diagram (Figure 3.2). Operators then kept check sheets on several points to tally the results spanning 12 days from June 4 to 16. (See Figure 3.3.)

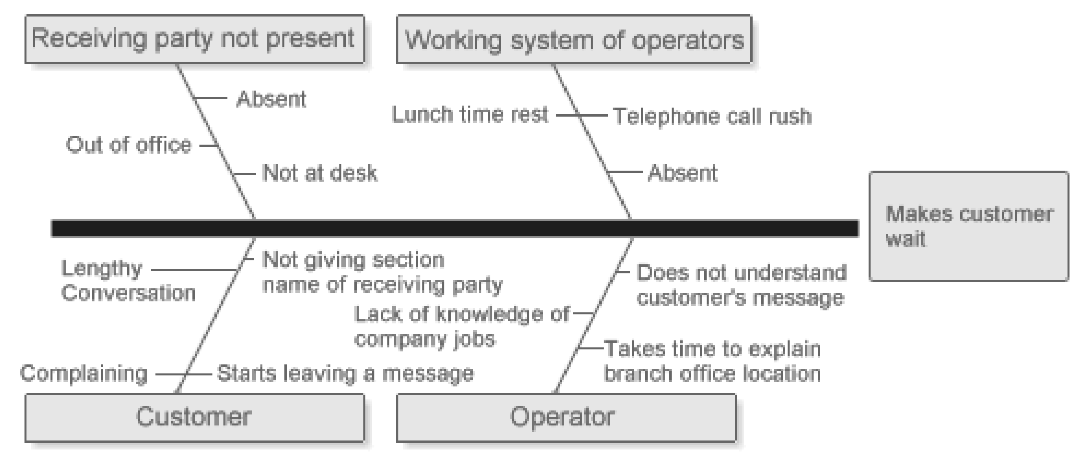


Fig. 3.2 Cause and Effect Diagram

FIGURE 3.3 *Checksheet - Designed to Identify the Problems*

REASON / DATE	No one present in the section receiving the call	Receiving party not present	Only one operator (partner out of the office		TOTAL
JUNE 4	||||	卌 |	卌 卌 |		24
JUNE 5	卌	卌 ||||	卌 卌 ||||		32
JUNE 6	卌 |	||||	卌 卌 ||		28
JUNE 15	卌	卌	卌 ||||		25

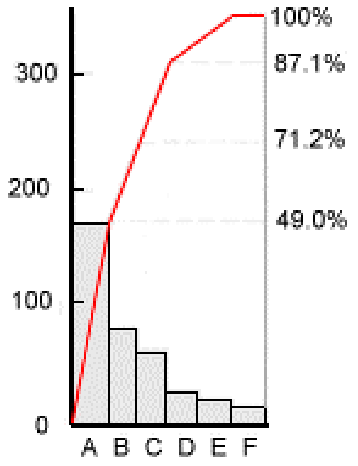
3. **Results of the Checksheet Situation Analysis**
The data recorded on the checksheets unexpectedly revealed that 'one operator (partner out of the office)' topped the list by a big margin, occurring a total of 172 times. In this case, the operator on duty had to deal with large numbers of calls when the phones were busy. Customers who had to wait a long time averaged 29.2 daily, which accounted for 6% of the calls received every day. (see figures 3.4 and 3.5)

FIGURE 3.4 ***Reasons Why Callers Had to Wait***

		Daily average	Total Number
A	One operator (partner out of the office)	14.3	172
B	Receiving party not present	6.1	73
C	No one present in the section receiving the call	5.1	61
D	Section and name of receiving party not given	1.6	19
E	Inquiry about branch office locations	1.3	16
F	Other reasons	0.8	10
	Total	29.2	351

Figure 3.5

Reasons why callers had to wait. (Pareto Diagram)



4. Setting the Target
   After an intense but productive discussion, the staff decided to set a QC program goal of reducing these waiting callers to zero. That is to say that all incoming calls would be handled promptly, without inconveniencing the customer.

5. Measures and Execution.
   (1) Taking lunches on three different shifts leaving at least two operators on the job at all times. Up until this resolution was made a two-shift lunch system had been employed, leaving only one operator on the job while the other was taking a lunch break. However since the survey revealed that this was a major cause of customers waiting on the line, the company bought in a helper operator from the clerical section.
   (2) Asking all employees to leave messages when leaving their desks. The objective of this rule was to simplify the operator's chores when the receiving party was not at his desk. The new program was explained at the employees' regular morning meetings, and company-wide support was requested. To help implement this practice, posters were placed around the office to publicize the new measures.
   (3) Compiling a directory listing of the personnel and their respective jobs. The notebook was specially designed to aid the operators, who could not be expected to know the details of every employee's job or where to connect his incoming calls.

6. Confirming the Results.

Although the waiting calls could not be reduced to zero, all items presented showed a marked improvement as shown below. The major cause of delays, 'one operator (partner out of the office)," plummeted from 172 incidents during the control period to 15 in the follow-up survey.

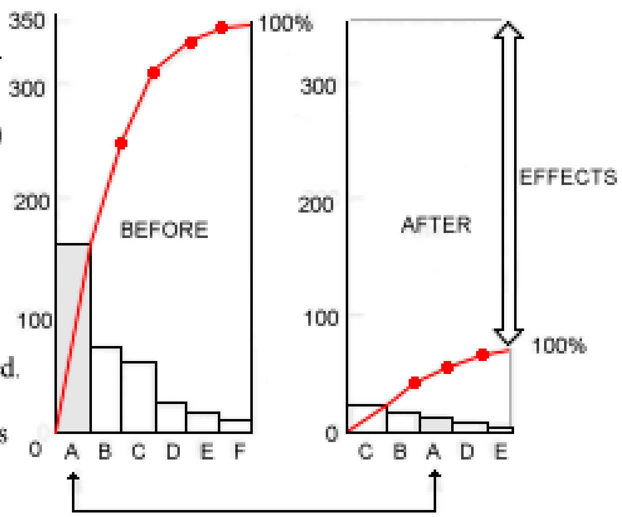
FIGURE 3.6 Effects of QC (Comparison of Before and After QC)

	Reasons why callers had to wait	TOTAL NUMBER BEFORE	TOTAL NUMBER AFTER	DAILY AV. BEFORE	DAILY AV. AFTER
A	One operator (partner out of the office)	172	15	14.5	1.2
B	Receiving party not present	73	17	6.1	1.4
C	No one present in the section receiving the call	61	20	5.1	1.7
D	Section and name of receiving party not given	19	4	1.6	0.3
E	Inquiry about branch office locations	16	3	1.3	0.2
F	Other reasons	10	0	0.8	0
	Total	351	59	29.2	4.8

Period: 12 days from Aug. 17 to 30.

FIGURE 3.7

Effects of QC (Pareto Diagram)



Problems are classified according to cause and presented in order of the amounts of time consumed. They are illustrated in a bar graph. 100% indicates the total number of time consuming calls.

from 'The Quest for Higher Quality - the Deming Prize and Quality control," Ricoh Company Ltd.

3.2.2.4 The idea of Total Quality Management

Total quality management is a holistic, dynamic approach to management. It involves all of the aspects of quality, but takes them further and integrates them completely into an organisation. TQM focuses on:

- Customer satisfaction.
- Involvement
- Continuous improvement.

Customer satisfaction.

Whether the customer is external or internal to the company, this is what keeps a company in business. Marketing departments often take on the task of determining what the customer wants, via methods such as customer surveys. But surveys may have design pitfalls: if you don't ask the right questions, you won't get the right answers. TQM must consider both current and future customer needs, while keeping in mind such possibilities as the development of new products that customers might not think of on their own but which they would respond positively to.

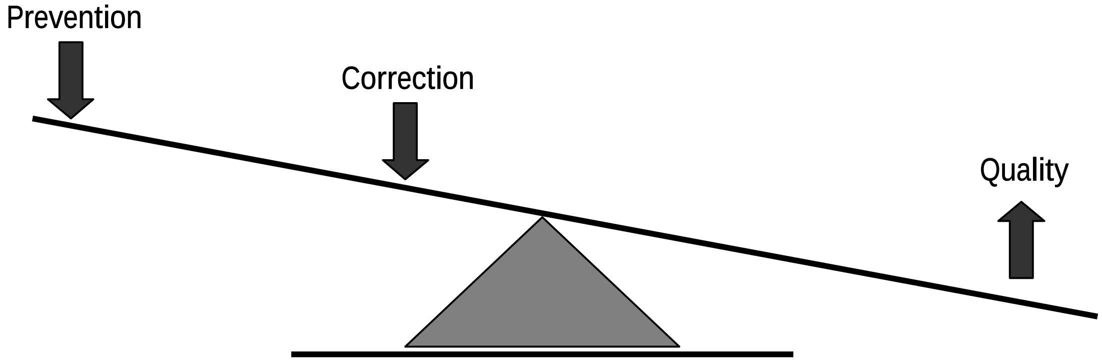
Involvement.

To achieve TQ, everyone in an organisation must be committed. Achieving this commitment is not easy and takes a long time. This is why most authors suggest that organisations need strong leadership and commitment from the top. Companies use mechanisms such as Quality Circles (which nowadays are cross-functional teams that meet regularly) and suggestion schemes to include people in the TQ objective. However, if these are not complete with training and information sharing, they won't work. The best results come when people work on issues which are relevant to them, using techniques they are familiar with, and they have the responsibility and often the resources to effect changes. Prior to practical and effective implementation of the TQ the following breakthrough concepts are necessary:

- Change the way of thinking of the individual
- Change the way of doing things in the company

Continuous improvement

In the ideal TQM environment, all processes are constantly under examination, and everyone in the company is committed to the concept of continuous improvement. If an organisation recognises that analysis and improvement of processes must be never-ending in order to achieve and retain customer satisfaction, provides avenues for both customer and employee feedback, and uses all the quality tools available, Total Quality Management can be realised.



3.2.3 Reducing costs

3.2.3.1 Different kind of costs

Costing is a very complex and sensible topic in managing a business. In this supervisory module we cannot cover the whole area of costing because this subject would cover a complete seminar by itself. But as a supervisor you should have in general a good understanding of the different kind of costs you will find in any company or workshop. Without this knowledge you will not be able to calculate properly or to recognize areas where you could reduce costs. You should identify the difference between direct costs and overhead costs.

Direct costs:	Can be related directly to a job order. Direct work, materials, etc.
Overhead costs:	Can not be related directly to a job order. Insurances, repairs, rents, etc.

To look more specific at different kinds of costs which play an important role in the workshop we have to divide them further. Mainly you have to deal with three types of cost:

- Material costs
- Production costs
- Overhead costs

Material costs

The material costs contain actually of two different kind of costs. One is easy to understand: the material costs are the costs for producing a specific item (direct costs). So the costs are directly related to a job order. But materials also causes overhead costs like storage, administration, work that you have during ordering materials, etc.. If we talk about real material costs we have to consider that they should consist of the two different types mentioned above, the direct and the overhead costs of material. Therefore your selling price for a specific material cannot be the same than the one you payed your supplier. Usually the management provides you with the material costs you have to use if you are the one the make a calculation.

Production costs

The production costs are all the costs created through work in the production for one job order. They can be related directly to the job order and include the work on machines, work done manual with hand tools, the set-up for the machines etc.. To determine the production costs you have to know the different machine rates you have to relate to each machine, the rates for the workers and the exact time for each operation. Production costs are also direct costs. A lot of companies include in the production costs the overhead costs for the machines and hand tools. Then the production cost is also a combination of direct and overhead costs for production. If your company don't do it this way, you have to include these overhead costs in the general overhead rate.

Overhead costs

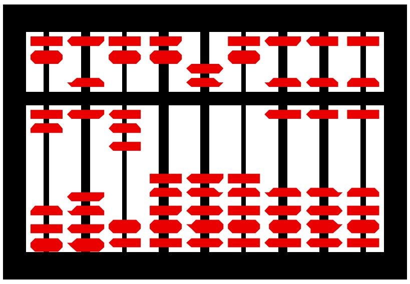
As mentioned before overhead costs are no direct costs, which means you cannot relate them to a job order. To run a company you have to pay a lot of additional costs such as SSS, taxes, insurances, rents, electricity, administration costs, repairs, maintenance, payment of interest, depriciation costs, vacation allowance, etc.. But nevertheless somehow the money for the overhead costs has to be earned. So you have to include these expenses partly in the costs for producing a job order/product. This is usually done by an overhead rate (in per cent) which you add to the production and material costs of a product.

Reducing costs

Since you are now familiar with the different types of costs you can determine in which area you can mostly influence the saving of costs:

	Material costs	Production costs	Overhead costs
Measures how to reduce the costs	➲ Proper storage of material should be implemented. ➲ Implement measures that reduce the waste material. ➲ Prepare effective cutting lists/schemes that consider the measurement of the raw material. ➲ Train the staff in not wasting materials.	➲ Follow the 5 S program, which enhance the cleanliness and order in the workshop. ➲ Train your staff regularly in all necessary areas. ➲ Provide regular maintenance to secure effectivly running machines. ➲ Shorten the set-up times by improving the way of doing it (training, specialize staff). ➲ Use always sharp tools. ➲ Prepare good jigs and other devices which will speed up the production ➲ Take care of right-in-time delivery of the materials. ➲ Always try to avoid bottle-necks. ➲ Make a proper production plan which you revise every day. ➲ Follow safety instructions, accidents do not speed up the production!	➲ Provide regular maintenance that will lower the costs for expensive repairs. ➲ Save energy whenever you can (electricity, fuel,...). ➲ Insist on following all necessary saftey instructions so that there will be no accidents.

3.2.3.2 Basis for proper calculations



If you as a supervisor are also responsible for preparing calculations for new items you need a specific knowledge for doing it. But you also need specific information from your management or your superior. Without these information you will not be able to come up with a proper costing.

The management should provide you with the following:

- ☐ Technical drawing of the item (or a sample)
- ☐ Specification of material, hardware and the quality standard (or a sample)
- ☐ Quantity of items that should be produced
- ☐ Machine rates for each machine in the workshop
- ☐ Operator rates (if they are not included in the machine rates)
- ☐ Material costs

With these information you can come up with the **cost of sales** for an item. If they expect you to give the net amount, you need the margin and the overhead rates they ususally add to the cost of sales.

Machine rates

The correct computation of the machine rates does not belong to your responsibilies, since it is a very complicated business management skill and usually done by specialized personnel like plan managers. They have to consider for example the depreciation, the interest and the expenses for the machine in relation to the space it requires and also the extimated operating life for a year.

Technical knowledge in woodworking

In general you need a lot of technical knowledge for preparing a calculation. You have to be able to perform the following:

- ➔ Interpret technical drawings properly.
- ➔ Recall the different materials and the hardware.
- ➔ Memorize the operations of all woodworking machines.
- ➔ Recognize the fastest production processes.
- ➔ Describe the working process step by step.
- ➔ Predict possible bottle-necks.
- ➔ Estimate the time for each working operation.
- ➔ Consider and estimate set-up times for each machine.

Measuring of materials

The first step for making a calculation is to determine the need of the different materials. We usually prepare a **cutting list** and an additional **list for accessories** such as hardware. For the accessories list you have to check not only for the supplier but also if the items are available in time. A cutting list is not only used for calculation but also afterwards in the production process. Below you can see an example for a very detailed cutting list, which provides all the necessary information for calculation and production process. The use of the metric system in your workshop should be trained and carried out since it is already an international standard.

Item:		Order number:
Customer:		Date:

Cutting List (including computation)

1	2	3	4	5	6	7	8	9	10	11	12	13	14
No.	Part	Material	No. of pieces	Length mm	Width mm	Thickn. mm	Area m^2		Volume m^2	Waste	Vol. + Waste	Price m^2	Price
1	*Leg*	*Gimelina*	*4*	*477*	*50*	*50*	*0,10*	*60*		*40*	*0,14*	*162,-*	*22,68*
2	*Rail*	*Gimelina*	*2*	*1130*	*10*	*50*	*0,02*						
2	*Rail*	*Gimelina*	*2*	*630*	*10*	*50*	*0,01*	*60*	*0,03*	*150*	*0,08*	*162,-*	*12,96*

<u>Title of column</u> <u>Comment</u>

1. No. — Number of the item
2. Part — Name and use of the different parts of the item (Leg, rail, profile,...)
3. Material — Type of the solid timber, of the wooden material, quality standard
4. No. of pieces — Number of the same pieces
5. Length — Exact measurement (length) of the finished item in mm
6. Width — Exact measurement (width) of the finished item in mm
7. Thickness — Exact measurement (thickness) of the finished item in mm
8. Area — Surface area: length x width x number of pieces
9. Raw thickness — Thickness of material when it comes from lumber yard
10. Volume — Volume in m^2
11. Waste Material — Waste in per cent, specified from the company for each material
12. Vol. + Waste — Volume plus waste amount to the volume needed (in m^2)
13. Price m^2 — Price per m^2 for solid timber, wooden materials, or veneers
14. Price — Price for the computed items

With a complete cutting list you can compute the material costs for your job order.

Determination of time

The second step for making a calculation is to determine the time that is needed for each working operation. You need this for the computation of the costs of production. The more experience you have in the production process the easier it will be for you to estimate the time for a working procedure. The scheme for the determination of working time is the following:

- ➔ Define the different steps of work to be done in the correct order
- ➔ Fix the appropriate machines you want to use
- ➔ Determine the amount of work (number of pieces, m^2, etc.)
- ➔ Consider the time for the machine set-up
- ➔ Compute the time for each working process based on your experience
- ➔ Add a percentage for transportation inside the workshop

When you have gathered these information you can prepare with the help of machine rates and operator rates the **costs of production**. But you can also use the information for the preparation of **routing sheets** and your further production planning process since they are vital for the production process.

Machine set-ups

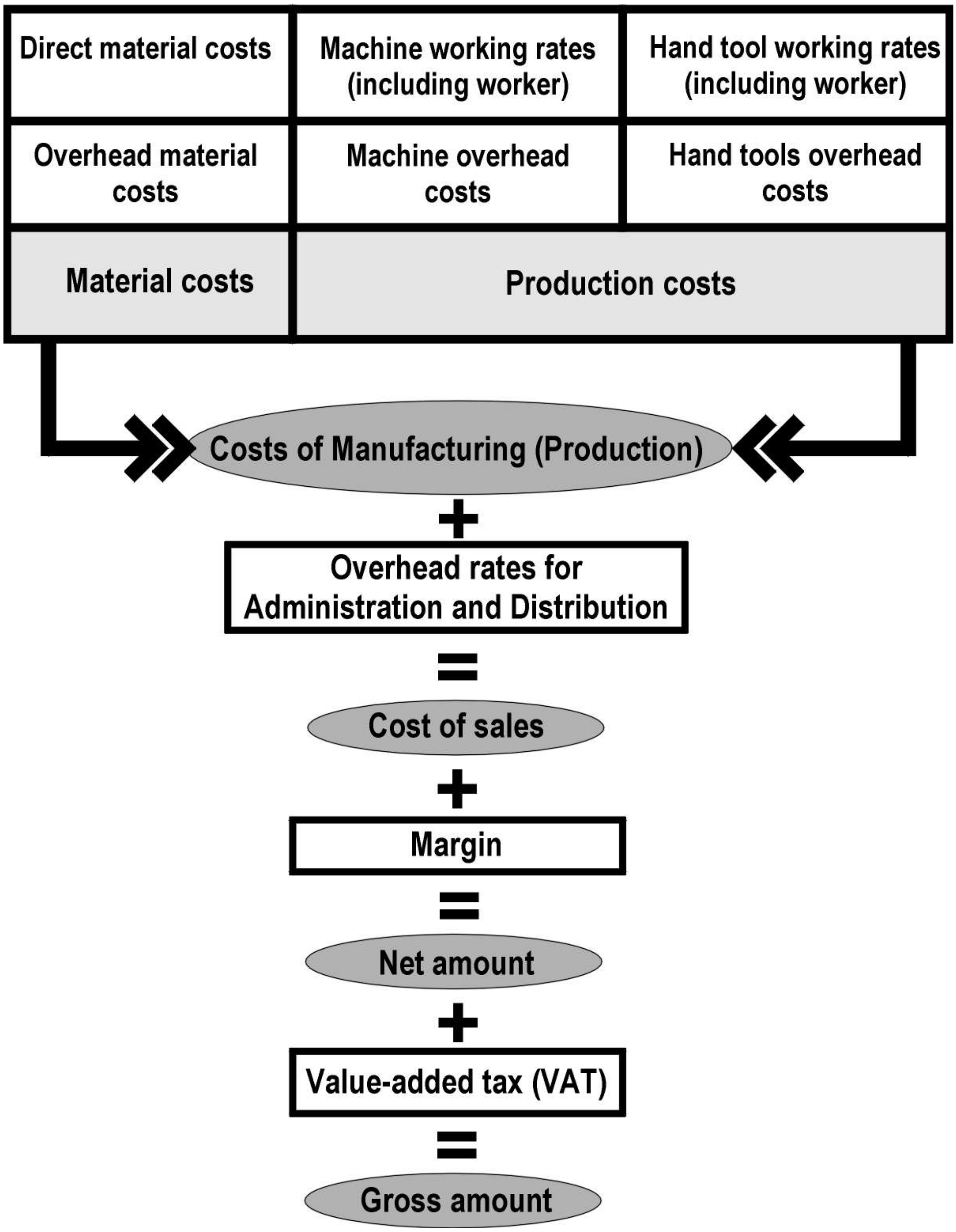
A special cost factor is the time for the set-up of machines. The lower the number of items you have to produce the more important are the costs for the set-ups. It is advisable in general to lower the time for machine set-ups as much as possible to minimize the costs in production. Below you find some measures for lowering the time for machine set-ups:

- ☐ Look for set-up "friendly" machines when you buy a new one
- ☐ Train your staff in setting up all the machines
- ☐ Store tools and devices for set-ups clearly arranged and close to the machine
- ☐ Use fences, jigs and measuring devices
- ☐ Use only carbide tipped tool since they last much longer
- ☐ Specialize some workers for complicated and costly set-ups
- ☐ Very frequent set-ups can be avoided by buying a second machine of the same type
- ☐ Pay attention to the need of only a few set-ups during the design process of a product (choose suitable measurments)

The time you need for the most frequent set-ups can be determined by time and motion studies so that you have a proper estimation for the duration of them.

To have an overview of the basis for proper calculations look at the picture below. You as a supervisor can be responsible for determining the material and the production costs as long as you get the required information form your superior. For coming up with the cost of sales or even the net amount of an item you need to know what the overhead rates and the margin are.

Basic Scheme for Calculations



Let us have a look at a example. Here you can see the composition of the **cost of sales** for a product and how to come up with a **gross amount** the customer has to pay.

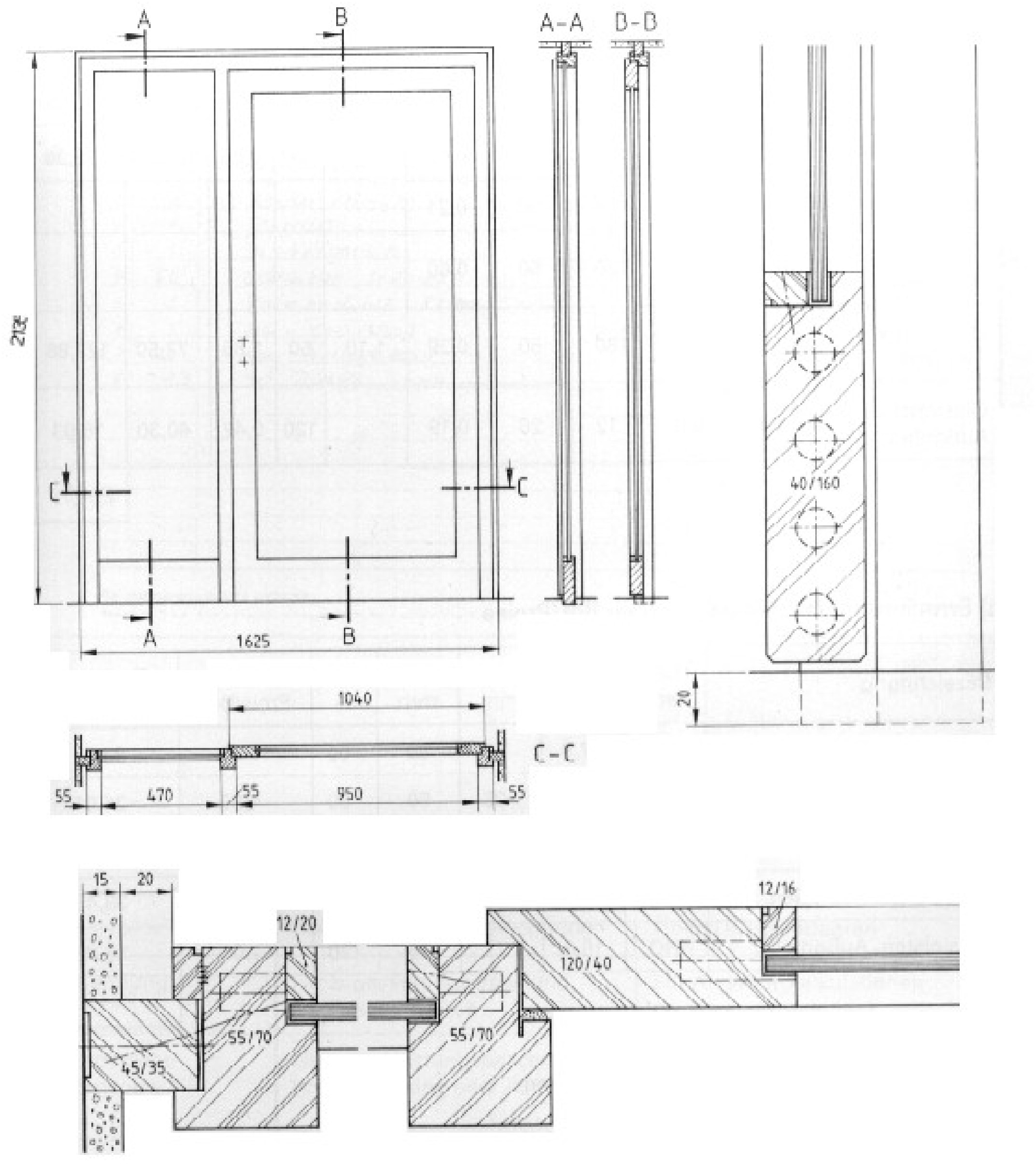
Material costs 39,300 Pesos 32%	Chipboard Solid timber Veneer Plywood Glue, screws Hinges Laquer, etc.
Production costs 31,920 Pesos 26%	Machine rates Operator rates
Overhead costs 51,580 Pesos 42%	Taxes Insurances Administration cost Rents Electricity Maintenance Repairs Depreciation Interest, etc.
Margin 13,540 Pesos 11%	Rate to cover risks and for further investments
VAT 20,460 Pesos 15%	Value added tax

SELLING PRICE
(Gross amount)

Example for a Technical Drawing

Technical drawing for an entrance door

All measurements in mm




```
Overall measurment: 1625 x 2135 mm
Solid timber:       Philippine Mahagoni
Finish:             Polyurethan laquer, glossy
Joints:             Dowel
Glass:              Security glass, 12 mm
```

Form for a Cutting List

Part No.	Part Name	Material Used	Rough Dimensions			Final Dimensions			No. of Pieces	Cost / Unit	Material Cost
			Length	Width	Thickn.	Length	Width	Thickn.			
									Total Cost:		

Company Name

ORDER ID	

ROUTING SHEET FOR: (Part Name)

CUSTOMER	
ORDER ITEM	
ORDER QTY	
MATERIAL	
NO. OF PIECES	

LENGTH ROUGH/FINAL			
THICKNESS			
WIDTH			

DRAWING NO.	

Process No.	Equip-ment used	Process Description	Time (min)	Setup Time (min)	Jigma-king (min)	Worker ID	Date	Addit. Worker	Actual Time Needed	Qty. Bal.	Worker Sign.
1											
2											
3											
4											
5											
6											
7											
8											
9											
10											
11											
12											
13											
14											
15											
16											
17											
		TOTAL:									

Form for a Routing Sheet

Form for a Calculation Sheet

Company Name				ORDER ID	
PRECALCULATION SHEET	for Item:				
Customer:				Material:	
Adress:				Drawing No:	
				Quantity:	
Material Costs					
Material Overhead		%			
(Plus)					
Production Costs	Prod.	Mach.	Worker	Mach . Rate	
(Machine/Section)	(hrs.)	Rate	Rate	incl. Wages	
(Equals)					
Total Production Costs					
(Plus)					
Administration Overh.		%			
Sales Overheads		%			
Product Developm. Overh.		%			
(Equals)					
Total Costs					
(Plus)					
Mark up		**%**	(Total Cost / ((100 - Mark Up)*.01))		
(Equals)					
Retail Price					
Profit		Peso			

3.2.4 Daily Routine Activities

5. 1. 0. Before Start of Shift (15 – 30 minutes)
- Check production schedule and/or work orders for the day
- Check equipment to be used
- Check supply of materials for the day
- Check tools needed for the day
- Line up equipment, materials, and tools for the day
- Line up firm work schedule for the day

5. 2. 0. Beginning of the Shift (15 – 30 minutes)
- Check attendance and assign employees to work stations, get support from your "group leaders"
- If necessary (because of absences), balance the work force by changing assignments or by securing additional help from other departments (discuss with management)
- Assign production and/or work orders
- Stress critical qualities to watch
- Specify when the work should be completed

5. 3. 0. During the Shift (6 – 7 hours)
- Check workmanship with each employees, approve, correct, instruct or train as needed
- Check work progress with each employee. Add help, allow more time, or assign additional work
- Check housekeeping, this is a continuos process! Good work cannot be done in an untidy place!
- Check back when production or quality appears unsatisfactory, especially with new employees
- Stay on the shop floor supervising and/or available for questions, assistance, and instructions most of the time
- Be on the floor immediately before and after breaks and for 15 minutes before quitting time
- Inspect critical quality areas as work progresses. Correct problems as soon as they are detected
- Perform final inspection of parts, subassemblies, and so on, before they move to next department (if possible, get group leaders involved)
- Check/Report/Conduct a study on recurring quality problems
- Check periodically to see that materials and supplies are on hand
- Check periodically to see that tools and equipment are in proper operating condition
- Report material shortages or recurring defects
- Report and/or request maintenance, repair, or replacement of defective tools or equipment

5. 4. 0. Once a Day
- Observe one employee or work station continuously for 15 minutes
- Look for time wasted, dull or improper tools, need for work positioning jigs and fixtures, interference, delays and bottlenecks, and expenditure of excessive time to get parts and materials. Do find ways to cut costs or make improvements in any of these

5. 5. 0. End of Shift (15 minutes)
- Make a list of unsolved problems that came up during the day. Consider ways to handle them
- Think about jobs that have to be done the following day / shift like checking production and/or work orders, materials and tools
- Complete all paperwork. Avoid holding any paperwork for the following day.
- Make a list of jobs that must be done the next day. Take it home with you and complete it before coming to work. Use this form to make your own daily plan!