Monitoring the team’s performance

- Why does your team need to be monitored?
- How can performance be monitored?
- You should ensure that you monitor only what is really important.

In the two BS2 sessions Making best use of your resources and Performing tasks effectively you learnt how important it is to ensure that tasks are performed efficiently and effectively. When you allocate tasks to members of your team you should be aiming to make the efficient and effective use of the resources available. Monitoring the team’s performance is all about making sure that you have succeeded in this goal.

Monitoring is important because it enables you and the team to be sure that you are achieving your goals. It also shows that you are performing to the highest standard you believe possible. That helps you to find ways of improving your performance. Your employer will also want to be kept informed about the team’s performance.

However, monitoring can also have a negative impact on the team. Monitoring can appear to be ‘checking up’ on people. It can imply a lack of trust and respect. In some organisations this is the case! As an effective leader you need to demonstrate to your employer that your team is performing to the highest standards. You should also be able to argue for keeping the level of monitoring to the minimum. This session will show you how and why.
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Why monitor?

Monitoring performance means checking it. Why should you need to monitor your team’s performance? There are two main reasons, which are:

- **to prove**
- **to improve**.

Proving means to show to your manager and to yourself that the team is doing what it is supposed to be doing. To improve means to find out any problems and put them right, or to identify things that could be done better. ‘Doing things better’ means being more effective (producing better quality goods and services) or being more efficient (producing them using fewer resources), or both.

The starting point for both proving and improving is knowing what you should be doing. This is what the two BS2 sessions *Making best use of your resources* and *Performing tasks effectively* are all about. It means knowing:

- What you are expected to be producing (your team’s **outputs**). This means both the quantity and the quality of goods or services your team produces.
- How you are expected to produce the output (the processes you use, the rules and procedures you should follow), and any efficiency or cost reduction goals you are expected to meet.

Exercise

What aspects of your team’s performance are monitored? List them and decide whether they are monitoring:

A. The quantity of output
B. The quality of output
C. Keeping to the rules or procedures
D. Improving efficiency/reducing costs

Use the form over the page to record your thoughts.
This saying, ‘You don’t fatten a pig by weighing it’ means that monitoring alone doesn’t improve anything. All it does is show (prove) what is being done. Monitoring needs to provide feedback to the team. Feedback simply means that the monitoring tells them how they are performing. It’s the only way that the team members will know what they are doing right and what needs improving.

If monitoring data is simply passed onto your managers, it is weighing the pig, but not doing anything to fatten it. (Data means the raw information about your team’s performance. It could be sets of numbers, but also includes things like customer comments and complaints.) On the other hand, too much data can be overwhelming. If everything that could be measured is measured, then it is hard to know what is important.

This is why many organisations talk about Key Performance Indicators or KPIs. KPIs identify what it really important for the organisation. By focusing on what really matters the team knows what its priorities should be. There is another saying that reflects this - ’An organisation becomes what it measures itself to be’. In other words, the KPIs not only measure performance, they shape it, because hitting KPI targets is all that matters. This can produce problems, as we shall see. The Case Study on the next page shows how this can affect the way the team works.
This Case Study is based on different approaches to monitoring staff in real call centres. You can see that one organisation is concerned primarily about the cost of calls, by measuring how many calls its employees can handle. The other is concerned with how well its customers are treated and their satisfaction with the service they receive. Each one encourages its employees to focus on that aspect of their performance, in order that they hit the performance targets set for them.

The best approach gets a balance between ensuring quality (or effectiveness) and efficiency. This is done by focussing on KPIs that reflect the most important aspects of quality and efficient use of resources.
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Monitoring techniques

There are many ways that performance can be monitored, just as there are many aspects of its performance that can be monitored. Here is a summary of the main approaches:

- **Automated recording of workflow** - this means that the level of output of the team is monitored through the equipment they use - their workflow. This is particularly common in manufacturing operations and in service activities using computerised equipment, from call centres (as described in the Case Study of Alice and Sam) to retail outlets.

- **Manual recording of workflow** by team members - in many organisations team members or the team leader will keep manual or electronic records of what they have produced. This could be on printed forms (manual) or in computer databases of some sort (electronic).

- **Sampling of output** - this is usually done to monitor the quality of what is being produced. It may be done by inspection teams, by the team leader or by team members themselves (especially when the process is automated). The principle behind sampling is that a properly selected sample (and there are usually rules about how the sample is chosen) represents the 'population' from which it is taken.

- **Visual monitoring** - simply watching people at work. This is probably the most common form of monitoring by team leaders and allows them to see how well team members are performing. If they see anything wrong they can take action there and then to correct it.

- **Video or audio recording** of team performance - this is often used in call centres where telephone conversations are recorded and may be monitored, and also in retailers where tills are kept under video surveillance for security reasons.

Exercise

Which of these approaches do you use? Is there anything you do that doesn't fit into any of these categories?
There is no point in collecting data on performance and then not using it. The purpose of monitoring is to ‘prove’ that the team is performing well and to ‘improve’ performance by identifying any areas in which improvement is needed or possible.

In either case, you should be comparing what has been done to planned performance. This could be by comparing performance with:

- **targets or goals** for the quantity of goods or services or level of activity, or for quality levels (e.g. for reject rates or number of errors)
- **standards of performance**, which describe how tasks should be performed or what products or services should be like.

In either case, the key question you should be asking is:

- How well does our performance match up to what was expected?

Any difference between what was expected and what was actually done is called a **variance**. A variance can be:

- **Positive** - you have done better than expected
- **Negative** - you have done worse than expected

As well as the variance, you may also be expected to explain why it has happened. It is just as useful to know why a positive variance has happened as a negative, because that way you may be able to repeat it. Finding out the cause of variances is a major part of the improvement process. Don’t look at it as being about making excuses and don’t let the team see it that way either. If someone has made a mistake, unless it was a serious failure to follow policy or procedures (which may be a disciplinary issue), make sure that you and the person know why it happened and learn from it. Making a mistake once is allowable; repeating it is careless.

**Case Study**

Alice has been looking at the call statistics for her team. Although team members aren’t set targets for call duration, the times are monitored. One team member, Saroya, seems to have much shorter calls than the others, and takes about 20% more calls in a day. Alice listens in to some of her calls and then goes to speak to her.

*(Continued on page 7)*
Most organisations have systems or procedures for reporting on performance. You may have to submit daily, weekly or monthly reports to your manager. These may be just the data you have collected, the variances between what was planned and what happened or they may be your comments on those variances. This reporting may happen automatically if the data is collected automatically. However it's done, your manager needs to be kept informed.

Always make sure that you understand the data that has been collected. If there are variances or patterns in the data, try to find out why these are happening. A pattern means that certain things seem to happen at the same times or in the same places, quite regularly. You should also alert your manager to anything exceptional that happens even if this is before the regular reporting time.

If you have agreed with your manager to make changes to how the team performs its tasks, as a result of your monitoring, make sure that you check regularly that these changes are taking place. Monitor that area closely so that you can see if it is working or not. If problems arise, you should be aware of them straight away so that the changes to the process can be revised. Don't try to hide problems in the hope that they will go away.

The whole purpose of monitoring is to enable the organisation to know what is going on. In other BS2 sessions you can learn how to solve problems with your team's performance. You can also learn more about how to deal with team members who are performing badly. But before you can do any of that, you need to know what is happening. That is what monitoring performance is all about.

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Alice: “Saroya, I noticed that you are taking more calls than everyone else. When I listened in to some I felt that you weren’t letting people tell you exactly what they wanted. It was all a little bit rushed. We like to give our customers full attention, you know.”

Saroya: “I know, but when I worked at National Direct Bank we had to keep calls as short as possible. I find it really difficult not to do the same.”

Alice: “I know, but it is important, Would you like me to sit with you for a while and coach you?”

Saroya: “Yes, that would be really useful. Thanks.”

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Keep your manager informed

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Complete the following exercises. Refer back to the session if necessary.

A. What are the two main reasons for monitoring performance?
   1. __________________________
   2. __________________________

B. Answer each of the following questions by circling the correct answer.

1. The outputs of your team are:
   a. what it produces.
   b. the equipment it uses.
   c. the materials it wastes.

2. Key Performance Indicators are:
   a. how good security is.
   b. what is really important for the organisation.
   c. how well you are leading the team.

3. Feedback means that you:
   a. let the team know how they are performing.
   b. congratulate the team on their performance.
   c. criticize the team for their performance.

4. Visual monitoring means:
   a. watching people's eyes.
   b. standing over people to keep them up to scratch.
   c. observing the team's performance.

5. Sampling output means that:
   a. it's OK if some is below standard.
   b. some is checked instead of the whole lot.
   c. parts of it are OK.
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Making Connections

Answer the questions following the case.

Sam decides to see his manager and discuss their monitoring of the call centre teams' performance. At the moment, they record:

- How long calls last
- How many each person receives in a day
- How long each person spends not on the telephone

As well as this, they record a sample of calls of people who spend longest on the 'phone and team leaders are expected to listen to these. The main purpose is to look at ways of shortening calls. If team members are felt to have spent longer than they needed to, then they receive a warning. After two warnings they get retrained and then if they still don’t meet the targets, they can lose their jobs.

- If you were Sam, what would you say to his manager about how they monitor team members?
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Think and Apply

How well do you use the skills in this session? How does your organisation monitor team performance?

- Does it monitor to prove and to improve?
- Does it look at the quality of performance as well as the quantity of output?
- Does monitoring focus on what is really important?

1. Read the list of skills. Tick the boxes to show your strengths and weaknesses.

<table>
<thead>
<tr>
<th>Skills</th>
<th>strengths &lt;-&gt; weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>I'm good at this</td>
</tr>
<tr>
<td>recognising the importance of monitoring in proving and improving performance</td>
<td></td>
</tr>
<tr>
<td>identifying the different aspects of performance that could be monitored and different ways that performance can be monitored</td>
<td></td>
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<tr>
<td>appreciating the importance of identifying variance in performance</td>
<td></td>
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<tr>
<td>keeping my manager informed</td>
<td></td>
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</tbody>
</table>

2. Do you want to improve any of these skills?

3. How do you plan to improve the skills you listed in question 2?
   (You might want to discuss this with your line manager or your tutor/mentor/coach.)