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# Time Management

Faculty Guide

Designed by:



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## Ice Breaker

1. Show the following slide to the participants (Slide no. 1):
2. **ACTIVITY:**
  - a) Ask the participants to open page no. 5 of their workbooks.
  - b) Show them the following slide (Slide no 2):
  - c) Now ask them to list all the activities that they would do before leaving their house. For e.g. - brushing teeth, having breakfast etc.
  - d) In the other columns, ask them to list the amount of time consumed by each activity on a working day and on a day off.
  - e) Give them 10 minutes to complete the exercise.
  - f) Now ask them to calculate the overall time for both.
  - g) Then give them another 10 minutes to answer the following questions on page no. 6 of their workbooks:
    - What is the difference between the times taken for the activities? Would you like to take the same time on working days as on days off? Or, would you like to be as punctual on a day off as you are on working days?
    - In what ways will you change your routine to have more time?
  - h) Discuss their answers and give them feedback.

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## Workshop Expectations and Objectives

### 1. **ACTIVITY:**

- a) Show the following slide to the participants (Slide no. 3):
- b) Ask the participants to get into groups of four or five.
- c) Ask them to discuss and write down their expectations from the workshop in the space provided on page no. 7 of their workbooks.
- d) Give them 15 minutes to write down
- e) After 15 minutes, ask a representative from each group to come up and read out the answers
- f) Discuss the answers and give feedback
- g) Now show them the following slide (Slide no. 4):
- h) Discuss the points mentioned on the slide

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## Introduction to Time Management

### 1. **PROBE:**

What do you understand by Time Management?

Or

What are the benefits of managing time?

Or

Are you able to manage your time well? Explain how. How has it helped you?

### **DERIVE:**

Discuss the answers that the students come up with and show them the following slide (Slide no. 5):

**Definition – Time Management is a process of monitoring or keeping a check on the quantity of time spent on various activities in order to increase efficiency, effectiveness and productivity.**

Time management is not just about managing time but also about controlling the use of the most valuable and undervalued resources we have at our disposal. It also includes managing one's activities in relation to time, setting priorities, taking responsibilities and using time efficiently.

Individuals have to prioritize their work and commitments while avoiding distractions from external factors. This will help them to become more efficient.

With effective time management, one can easily focus and manage both personal and professional fronts. A good work-life balance is maintained when an individual learns to manage time.

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Time management is an endless cycle of making decisions which may be big or small, but which can definitely bring about a change in one's life. Time management is about managing time efficiently, so that the time saved can be used to make life richer and better.

Organizing and planning are the keys to effective time management. Each person has her/his own priorities in life and they plan and strategize their time accordingly.

Now show the following slide (Slide no. 6):

Managing time can help you to:

- Reach the targets
- Complete the most significant tasks
- Maintain a good work-life balance
- Meet deadlines of assigned tasks
- Decrease and manage tension and stress
- Work smart and not hard

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## Importance of Time Management

### 1. **PROBE:**

What benefits are gained through effective time management?

Or

In what ways does effective time management improve your overall performance at work and elsewhere?

### **DERIVE:**

Ask the participants to share their views with the rest of the class.

Show them the following slide (Slide no 7):

Discuss the points on the slide in detail as mentioned below:

- a) **Prioritization:** Whenever you are trying to manage your time, you should always prioritize your tasks in hand that are more important than other things. Prioritization is an important step as it helps you in saving time that is prone to get wasted on trivial activities that you might get involved in.
- b) **Inculcates Discipline:** Discipline in time management enables you to reach the optimal output of your time and energy. It gives you a clearer vision on what needs to be done, and hence provides the right direction.
- c) **Improves Organizational skills:** Effective time management helps you to keep your stuff organized and prevents wastage of time on frivolous tasks such as searching documents, looking for folders and other items. It can help you in keeping your work zone or study station well-arranged where all the things relevant to your work are organized. Therefore, the



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next time, you are not in a situation where you need to search all over the place to find a file.

- d) **Better preparation leads to improved self-confidence:** Being prepared gives you a sense of accomplishment even before you have completed the tasks and this helps in boosting your morale and adding a sense of satisfaction. Furthermore, it helps you to avoid working in the last minute and the time saved then, can be used to relax.

Now, show the next slide (Slide no. 8):

Discuss the points in detail as mentioned below:

- e) **More Successful:** When time is used appropriately and efficiently, the best by-product is more free time. Individuals with good time management skills are better at setting their goals and following through with them. Moreover, completing tasks on time can give you a better reputation among peers and bosses; hence, people take your work more seriously.
- f) **Better time management – Improved forecast:** When you become better at setting goals, you have a clearer idea of what you want to accomplish in your work. Same principle can be applied for long-term plans, for example where you want to be in two or three years from now, etc.
- g) **Less prone to stress:** When you are well prepared, you have more time to relax, sleep and be healthy. So, time management can benefit your health and make you less prone to stress.
- h) **Working on Time:** When you have a proper plan and schedule of the tasks to be completed within time constraints, you tend to work on time and complete the activities within stipulated time limits.

Now, move on to the next slide (Slide no. 9):

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- i) **Enhanced Efficiency:** Efficiency can be defined as the number of things achieved out of the total number of things done. Time management helps you in achieving goals in a timely and efficient manner. However, without a proper plan, you end up doing many unnecessary things and that lowers your efficiency.
  - j) **Motivation:** Working with a proper time management schedule motivates you to put in more effort and complete the task on hand in time.
  - k) **Improvement of Management Skills:** When you perform many tasks simultaneously with an effective disciplinary approach, your managerial skills are honed and tasks become easy to accomplish. These management skills are very helpful when you work in an office or any other organizational places.
  - l) **Confidence and Satisfaction:** Time management is a serious issue, which includes many things. When things fall into right places and work is done quickly and efficiency, it boosts your confidence and satisfaction levels. This enhanced level of confidence and satisfaction can be achieved with the help of proper time management.

## 2. ACTIVITY:

- a) Show the following slide to the participants (Slide no 10):
- b) Ask them to open page no. 14 of their workbooks.
- c) Ask them to fill in the answers individually
- d) Give them 5 minutes to complete the exercise
- e) After 5 minutes, discuss the answers with them as mentioned below:

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Question No.	Yes	No
1	✓	
2		✓
3	✓	
4	✓	
5		✓
6	✓	
7	✓	
8	✓	
9		✓
10	✓	

f) Tell them that each correct answer holds one mark.

A score, lower than five indicates that you need to learn time management and a score of more than five shows that you know how to manage time effectively.

g) Discuss their scores and give them feedback

## Misconceptions about Time

### 1. ACTIVITY:

- Show the following slide to the participants (Slide no 11):
- Ask the participants to open page no. 16 of their workbooks
- Give them 5 minutes to complete the exercise
- The exercise consists of statements with which the participants may agree or disagree.
- They have to choose and tick an option that they think is appropriate, in the space provided after each statement.

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f) After 5 minutes move on to point no. 2

g) The answers will be discussed later

2. **PROBE:**

What are some common misconceptions that people have about time?

Or

‘Work is better performed under pressure’. Do you agree? Give reasons.

What are some other such misconceptions?

**DERIVE:**

Show the following slide to the participants (Slide no 12):

Discuss the points on the slide in detail as mentioned below:

1. **Managing time is simple – it just needs common sense:**

It is true that the concept of time management is very easy to understand but the attitude and efforts required to follow this practice is not so easy. One has to constantly try hard to attain a level of proficiency in this field.

2. **Work is better performed under pressure:**

Psychological tests have confirmed that the statement, “Work is better performed under pressure”, is nothing but a procrastination excuse. Nobody can work better under pressure because stress is harmful for a person’s physical as well as mental health. Better performance is achievable only if the environment is supporting and motivating. For example, if in the last over of a cricket match, a team wins, then the credit for winning does not go to the pressure through which players were undergoing, but the strategies and skills they used while playing.

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**3. I have a to-do-list and a secretary:**

One needs to be self-organized and no other person can make it happen for anyone. The problem faced in case of disorganized people is that they neither have time to listen to their secretaries nor do they take a look at a to-do-list.

**4. I don't have time:**

Time management is a skill developed after a long period of practice. Where a laggard would need a whole day to get a simple task done, an effective time manager would get all the significant tasks done in the early working hours of the day and then take rest and be calm and composed to tackle the tasks that confront him in the latter hours of the day.

**5. My work is creative, so I don't need time management:**

Time management is not just related to the routine activities, it is about self-discipline and saving more time to be spent on better things in life rather than just wasting it away on frivolous activities.

**6. Time management ruins fun:**

If on one hand, someone has many important tasks to finish, but he/she goes and has fun with friends and family, while on the other hand, he/she has completed all the important tasks and got ample amount of time to enjoy...Which one of the above two cases will be fun? Surely, the second case sounds better. Therefore, time management makes room for enjoyment as well.

**3. Now show the following slide to the participants (Slide no 13):**

Ask the participants to check the answers to the previous exercise.  
Discuss and give feedback.

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## Characteristics of an Ineffective Time Manager

### 1. PROBE:

What are the features of an ineffective time manager?

Or

How would you identify an ineffective time manager?

Or

Do you know any person who is an ineffective time manager? Explain his/her characteristics.

### DERIVE:

Show the following slide to the participants (Slide no 14):

Discuss the points on the slide in detail as mentioned below:

- a) **Constant Haste:** When a person is always in a rush without a pause and always shows haste in every task, it indicates that the person is not good at managing tasks efficiently and has loads of work pending that needs to be completed. This clearly shows poor time management.
- b) **Habitual Delays:** When people are unable to complete their tasks in time, they tend to get late in each meeting or always keep postponing their schedules. This shows inability of such people in managing time.
- c) **Low motivation, energy and productivity:** When the tasks are delayed or are pending, the motivation and energy of the person is lowered. Moreover, it leads to lesser productivity.
- d) **Frustration:** The worse a person is at time management, the more frustration he/she will experience. They will feel as if the whole work is stuck and nothing seems to move ahead.

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- e) **Impatience:** People tend to get angry easily, because they experience stress each moment due to the pending target that needs to be accomplished before deadline.
  - f) **Variation in Decision Making:** A person who is poor at time management, changes his/her decisions rapidly, because they think that whatsoever option they choose, it is going to end up in loss. Thereby, they feel depressed and lose self-confidence.
  - g) **Inability to set Goals:** People do not know how to set goals and because of this, they end up in a complete chaos.

## 2. ACTIVITY:

- a) Show the following slide to the participants (Slide no 15):
- b) Ask them to choose their reaction to each of the statements in the exercise  
  
1: Disagree completely    2: Neither agree nor disagree    3: Agree completely
- c) Tell them to try to choose either 1 or 3 and avoid the middle path.
- d) Give them 15 minutes to complete the exercise.
- e) After 15 minutes, ask them to score their answers based on the points mentioned on the following slide (Slide no 16):
- f) Discuss their scores and give them feedback

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## Time Thieves

### 1. **PROBE:**

What factors contribute to unnecessary loss of time?

Or

Can you name some 'time thieves'?

Or

Poor planning leads to waste of time. What other factors can you think of?

### **DERIVE:**

Ask the participants to share their answers with the rest of the class.

Ask them to open page no. 26 of their workbooks.

Show them the following slide (Slide no. 17):

Now discuss the points on the slide in detail as mentioned below:

- a) **Poor Planning:** Poor planning results in impatience and haste to complete tasks in limited time. Lack of proper planning leads to improper initiation of task, resulting in unproductive usage of time.
- b) **Crisis Management:** This is the result of absence of prioritization of tasks. This results in doing unimportant tasks prior to the important ones. Thus, managers are unable to find time to do the important things in time.
- c) **Interruptions:** Interruptions are a result of poor planning, lack of control over environment and poor focus. Managers must learn to deal with interruptions and avoid them if they wish to get work done in time. Interruptions may be in the form of – drop-in visitors, telephone calls, confusion and improper communication. Thus, managers should work in areas without disturbances and inform others whenever they are busy.
- d) **Procrastination:** Tasks in hand must not be put off for a later time, even if it can be done later. This may lead to piling up of the workload and a



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chaos at the end. Sometimes, people are so busy in improving their methods of getting jobs done that they are never able to finish these tasks on time. Thus, managers should look into whether their improvement methods are working towards progress or hindering the path of getting tasks done in time.

- e) **Not assigning:** Many people think that the work in their hands can only be done by them and no one else can do it the way they can. Because of the fear of failure, they hesitate to assign their jobs to junior employees. They feel that a particular kind of task can be only handled by them and if someone else is unable to do it properly, all blame has to be taken by them solely.
- f) **Unnecessary Meetings:** If a meeting is held without a proper and clear motive then that meeting is a complete failure because it leads to no productive results and is a sheer waste of time.
- g) **Disorganization:** A proper organization leads to a good working environment. Following a schedule, keeping things systematically arranged and possessing all necessary information before starting a task keeps the bad mood away from the managers.
- h) **Poor Setup:** Sometimes, in organizations the environment for managers is not so convenient, because the things that are frequently required by managers are not within their easy reach. Because of a poor setup and improper seating arrangement, whenever the managers pass by someone they tend to pull that person aside and steal his/her time.
- i) **Inefficient Networking:** If a manager does not have an open communication with all his employees, he is unknowingly going through a great loss in terms of time management because a proper communication and an efficient network leads to better understanding of work that is assigned to all members of an organization and this leads to better productivity in lesser time.
- j) **Bad Attitude:** Whenever a person is showing his/her bad attitude, they waste their time. Instead of getting angry and complaining to their staff they can utilize this time in working out on solutions to the problems that have occurred.
- k) **Unpleasant People:** Such people who are unproductive and interfere in the success path of others should definitely be avoided no matter what. When managers listen to such people, it leads to unnecessary depletion

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of useful time. Thus, unpleasant and negative people should always be kept at a distance.

2. **ACTIVITY:**

- a) Show the following slide to the participants (Slide no. 18):
- b) Ask them to open page no. 27 of their workbooks.
- c) Tell them that they have 10 minutes to complete the exercise
- d) The exercise consists of some situations and each situation is followed by two options. The participants have to circle the appropriate option.
- e) After 10 minutes, show the following slide to the participants (Slide no 19):
- f) Ask the participants to compare their answers with those mentioned on the slide.
- g) Discuss the results and give feedback

## **The Three Generations of Time**

1. **PROBE:**

Explain the three generations of time management. What is the need for a fourth generation?

Or

Explain each generation of time management. What did each of them lack?

**DERIVE:**

Ask the participants to turn to page no. 30 of their workbooks.

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Show the following slide to the participants (Slide no. 20):

Explain the points on the slide in detail as mentioned below:

Long ago people began to realize that it is important to manage time in order to enhance their productivity and life in general. Since then, there has been significant improvement in the way each generation handled the problem of time management. Each new generation recognized the drawbacks of methods adopted by the previous one and improved on them.

Time management techniques of the three generations are listed below:

### **First Generation**

**What it is:** This generation tried to manage time by using checklists and reminders. Now, people just had a list of the work that is to be done but they did not know about the urgency and importance of the work.

**What it lacked:** Time was disorganized, in terms of complexity, urgency and importance.

Thus, such techniques often caused people to miss out on some of their commitments.

### **Second Generation**

**What it is:** It was characterized by calendars and appointments' books. This generation's time management was based on looking ahead and planning. So, there was a proper planning and scheduling of events, and a greater consciousness about deadlines.

**What it lacked:** The shortcoming of this type of management was the lack of time and importance for human relationships.

### **Third Generation**

**What it is:** This generation prioritized tasks and recognized the values. It focused on setting goals and classified them into long, intermediate, and short-term goals.

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So, there was a considerable increase in achieved goals and productivity was enhanced. The principles this generation emphasized on were efficiency, control, and independent achievement, focus on quality of work done rather than quantity.

**What it lacked:** This generation also did not realize the importance of putting time into relationships and one's personal life.

### **The Need for the Fourth Generation**

It has been found that the third generation time management was very restricted and mechanical. Human beings are not machines; we need love and support to go on in life. So, there is a need to transcend the idea of time management to relationship levels too. One must focus on accomplishing results as well as enhancing relationships.

#### **Points to remember:**

- An approach is needed for time management that takes care of both career and relationships.
- Any approach that does not satisfy the above will disturb the vital balance needed and therefore will not work successfully.

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## Monochronic and Polychronic Views of Time

### 1. PROBE:

What do you understand by monochronic and polychronic views of time?

Or

Explain the characteristics of monochronic and polychronic managers.

### DERIVE:

Discuss the following points with the participants:

The **monochronic** approach lays emphasis on spontaneity, brevity, agility and punctuality. It is an efficient and focused way of managing time at work and at home. People adopting this approach believe in detailed planning and scheduling. They follow schedules strictly and work on one task at a time. They do not like their schedules to be disturbed and do not entertain extraneous matters that tend to divert them from their path.

The **polychronic** approach on the other hand lays emphasis on the aspirations, flexibility, imagination, intuition and commitment.

Now discuss the points on the following slide (Slide no. 21):

### 2. ACTIVITY:

a) Show the following slide to the participants (Slide no. 22):

b) Ask the participants to open page no. 33 of their workbooks.

c) Tell them that they have 10 minutes to finish the exercise

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- d) In the exercise, there are two alternatives for each number and the participants have to circle the appropriate choice according to their opinion and guess whether the statement is polychronic or monochronic.
  - e) At the end, they need to sum up the poly- and monochronic choices that they have circled and know what type of person they are, using the table given on page number 35.
  - f) After 10 minutes, show them the following slide (Slide no. 23):
  - g) Discuss the scores and give feedback

## Goal Setting

### 1. **PROBE:**

Why is it important to set goals? What are SMART goals?

Or

Explain the acronym SMART with reference to goal setting.

### **DERIVE:**

Show the following slide to the participants (Slide no 24):

Goal setting is a performance booster that motivates the employees and managers. As and when a goal is accomplished it gives a sense of satisfaction and achievement. However, it is very important to set goals in the right way.

Now show the following slide (Slide no 24):

Smart goals are the ones that are:

- a) **Specific:** Set goals should be answerable to questions that start with, What, Where, When, Why, and Who. Goal must be specific, and you must clearly identify what is to be achieved.

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- b) **Measurable:** Measurable goals are the ones that can answer the questions starting with How much, How many, How often. For example, if a company has to reach out to 750 customers in a month, they can measure their daily workload based on the goal they have to achieve.
- c) **Attainable:** Before starting work on a project or a goal, it should be clear whether the set goal is attainable or not. If the restraints in the path do not allow the goal to be attained as desired, then the level of difficulty should be lowered so that it becomes attainable.
- d) **Realistic:** Not every goal that is set need be simple, but it should be a thoroughly researched goal. The questions that you can ask yourself are:
- Do I have sufficient resources to achieve the goal?
  - Do I have support of colleagues?
  - What skills am I lacking and what do I need to learn?
  - Have I rechecked the workload with supervisor to prioritize this goal with other goals?
- e) **Timely:** A time restriction is important in driving the employees towards reaching a goal in given time-period. It generates a sense of urgency to complete the task at hand. It also gives necessary motivation to employees to complete the task in time.

## 2. **ACTIVITY:**

- a) Show the following slide to the participants (Slide no 26):
- b) Ask the participants to open page no. 38 of their workbooks
- c) Give them 15 minutes to complete the exercise
- d) The exercise consists of some inefficient objectives and the participants have to convert them into SMART goals

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e) After 15 minutes, discuss the answers and give feedback.

## Prioritization

### 1. **PROBE:**

What do you understand by the term prioritization? What are the two steps to prioritize?

Or

Explain the ABC method of prioritization.

### **DERIVE:**

Show the following slide to the participants (Slide no 27):

Now explain in detail as below:

The following are the categories that can help in prioritizing work:

- **Priority A: “Must-Do”** – these are the most critical tasks that need to be at the top of a priority list. These tasks are very crucial because these may include opportunities for advancement, significant customer demands, or management directives.
- **Priority B: “Should-Do”** –these tasks hold a medium value. These tasks do not have strict deadlines and may not be very essential to do.
- **Priority C: “Nice to do”** – these tasks hold the lowest value. These tasks are not important, so they can be completely eliminated and kept for free time.

### 2. **ACTIVITY:**

a) Show the following slide to the participants (Slide no 28):



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- b) Ask the participants to open page no. 41 of their workbooks
  - c) Give them 10 minutes to complete the exercise
  - d) Ask them to list the tasks that they would do in that week under each category
  - e) Discuss their answers and give them feedback

3. **PROBE:**

Explain the criteria for prioritization.

Or

Explain judgment, relativity and timing as the criteria for prioritization.

**DERIVE:**

Ask the participants to share their answers with the rest of the class.

Show the following slide to the participants (Slide no 29):

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## The Compass and the Clock

### 1. **PROBE:**

Explain the concept of the compass and the clock with reference to time management.

Or

Describe the compass and the clock as tools to describe what to do with our time.

Or

What are some problems that may arise when we are stuck between the clock and the compass?

### **DERIVE:**

Show the following slide (Slide no. 30):

The compass and the clock can be described as tools that help us decide what to do with our time. The two factors that play key role in managing time are – urgency and importance. These two factors are controlled by two tools – the clock and the compass, respectively.

The clock represents:

- Goals
- Tasks
- Commitments
- Appointments
- Activities
- Assignments
- Opportunities
- Schedule
- Routine

The compass represents:

- 
- Vision
  - Direction
  - Conscience
  - Values
  - Priorities
  - Mission

The problem occurs when we are stuck between the clock and the compass.

Some problems that may arise from this are:

- Imbalance in one's personal and professional work
- Feeling of being out of control, hence, entrapment
- Feeling as though we are constantly in some crisis
- Problems in personal relationships
- Making excuses and losing professionalism

## **Time Management Matrix**

### **1. PROBE:**

What do you understand by the time management matrix?

Or

Explain how the time management matrix distinguishes between Urgent/ Non- urgent and Important/Non-important factors that we spend our time on.

### **DERIVE:**

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Show the following slide to the participants (Slide no 31):

Explain in detail as mentioned below:

The matrix below, distinguishes between Urgent/ Non- urgent and Important/Non-important factors that we spend our time on. The matrix shows four quadrants; by placing your daily activity in these quadrants, you can find where to allocate your time appropriately.

**Quadrant 1: Urgent – Important**

1. This quadrant is unavoidable.
2. It requires our immediate time and attention.
3. It is important to remember, that saving work for last minute can land your work into this quadrant. This should be avoidable because too many tasks in this quadrant will only cause havoc.

**Quadrant 2: Not Urgent – Important**

1. These are the activities that are important, but do not require immediate attention.
2. This is a good place to be in, as it gives more time to manage and organize the work at hand. With better planning, work can be done more efficiently.
3. Although this includes more than just professional work, there are also personal responsibilities that need to be met. They can be better handled if they are important but not urgent.
4. Ignoring or delaying the activities in these quadrants can cause them to shift to quadrant 1, which is not an ideal place to be in. Hence, it is important to see this quadrant as an opportunity to plan and prepare in a better way.

**Quadrant 3: Urgent – Not Important**

1. This might appear to be confusing, because it is difficult to think of a task that may not be important but urgent.
2. This refers to tasks that may be important to person A, but not to person B. This is where our values clash with others.

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3. This also makes us realize that just because things are urgent, they do not become important. This could include activities such as brainstorming, making phone calls, etc.

#### **Quadrant 4: Not Urgent – Not Important**

1. This quadrant falls to the bottom of our priorities. These are neither important, nor urgent.
2. We are generally exhausted from moving between quadrants III and I. So, we start focusing on these activities, as a break or procrastination.
3. These activities then become 'time pass' or waste of time

#### **2. ACTIVITY:**

- a) Show the following slide to the participants (Slide no 32):
- b) Ask the participants to complete the exercise on page no. 47
- c) Give them 15 minutes to complete it
- d) After 15 minutes, discuss the answers as given below:

#### **Answers:**

1. Quadrant 2
2. Quadrant 2
3. Quadrant 1
4. Quadrant 4
5. Quadrant 4
6. Quadrant 2
7. Quadrant 1
8. Quadrant 2
9. Quadrant 4
10. Quadrant 2
11. Quadrant 4
12. Quadrant 1
13. Quadrant 2

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- 14. Quadrant 3
  - 15. Quadrant 2
  - 16. Quadrant 2
  - 17. Quadrant 2
  - 18. Quadrant 4
  - 19. Quadrant 2
  - 20. Quadrant 4
  - 21. Quadrant 2
  - 22. Quadrant 1
  - 23. Quadrant 1
  - 24. Quadrant 2
  - 25. Quadrant 4
  - 26. Quadrant 3
  - 27. Quadrant 2
  - 28. Quadrant 2
  - 29. Quadrant 2

- e) Tell the participants that they may differ on some of the answers. However, that is all right; what is important may differ from person to person or from one type of job to another. The main point is to *make you identify what is important for you.*

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## Managing Interruptions

### 1. **PROBE:**

What are some common interruptions that occur during work?

Or

How can we overcome interruptions when at work?

### **DERIVE:**

Now-a-days, people are so accustomed to interruptions that they do not even realize that they are being interrupted. Some interruptions are unavoidable because the boss may not necessarily have the same priorities as his subordinates. How many of these circumstances are familiar:

- Using interruptions as excuses
- Trying to work on many tasks at once
- Procrastinating
- Getting distracted many times and easily
- Accepting calls that are not relevant to work at the time of work
- Chatting with co-workers frequently
- Replying to each email that appears in the email inbox

Show the following slide to the participants (Slide no 33):

Well if these situations sound familiar then one is unable to avoid interruptions. However, following measures can be taken to manage interruptions:

- Not calling for a meeting unless it is truly necessary  
If it can be done through e-mail or a phone call, it should be done that way instead of wasting others' time in unproductive meetings.
- 'Do not disturb' is necessary whether it is the phone or the door.  
Whenever required, one must assure that no one disturbs while he/she is involved in work.

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- Learn to say 'no'. Most of us tend to agree to everything that others say. We wish to be seen as team players. However, sometimes it is better to say no in order to control the workload.
  - Prioritizing emails by telling everyone to put a subject because each email is not urgent.

## Managing Procrastination

### 1. **PROBE:**

What is procrastination? How can we avoid it?

Or

When you lay emphasis on things that are not so important according to your organization's goals and priorities, you are procrastinating.

How can you avoid this from happening?

### **DERIVE:**

When you lay emphasis on things that are not so important according to your organization's goals and priorities, you are procrastinating.

Sometimes when you delay your work, it may not necessarily be the case of procrastination because you may not have complete information about the task.

Show the following slide to the participants (Slide no 34):

Discuss the points on the slide in detail as mentioned below:

#### 1. **When the Task is Unpleasant:**

- You should reflect on the fact, that if you do not do a task then what will be its effects on you, your co-workers and your customers.
- Keep in mind that you are paid for a task, as it is important from your supervisor and organization's point of view.
- Identify the ways you can reward yourself by completing such tasks.



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## **2. When You are Disorganized:**

- Make it a routine to clear your desk before leaving for the day.
- As and when papers and email come, you should attend and complete them as soon as possible to avoid a pile up.
- Plan your day, based on the important tasks to be done that day.
- Make use of a timer to keep a track of the time you have spent.
- Pre-plan the next day before leaving.

Now show the following slide (Slide no 35):

Discuss in detail as mentioned below:

## **3. When the Project feels Overwhelming:**

- Break a major task into smaller easily achievable tasks.
- Initiate by doing easier tasks first to get a feel of accomplishment and satisfaction.
- You can feel more optimistic and motivated if you reward yourself after the completion of each sub-task.
- Ask others to give an input, as this is your first time at handling a big project.

## **4. When You are a Perfectionist:**

- Constantly keep reviewing the project with the supervisor in order to see if the progress is as desired by the supervisor and ensure that you are on a right track.
- You can avoid any potential errors that tend to occur in future if you keep discussing the task with your co-workers and supervisor.

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- Remember that no one is perfect and keeping this fact in mind, take the tasks as a challenge rather than procrastination.
  - Adopt some stress management techniques to fight the situations that call for more mental effort.

**5. When You have Trouble Making a Decision:**

- Use group unanimity to make a best decision.
- Ask you supervisors and others to give their input.
- When you do not have others to help you, make the best choice according to your experience.

## Scheduling

**1. PROBE:**

What are the benefits of scheduling?

Or

What are the ways in which scheduling can be done?

**DERIVE:**

Show the following slide to the participants (Slide no 36):

Explain the below mentioned points:

Many people do not understand the advantage of schedules; rather they consider it restrictive. The schedules add to the benefits at work as it allows you to:

- Allocate equal time to all important tasks.
- Avoid unnecessary interruptions by sticking to the schedule.
- Limit meetings within the time they are scheduled for, instead of letting it go for as much people feel like.

- 
- Allot time for intervals.

## Scheduling Options

There are three options for scheduling:

1. **Long Term Schedules:** when people have long-term goals such as quarterly or annual goals they should start with a master planner where they can list the major targets to be achieved each week. This way they should allot an important task to each week and complete their quarterly or annual tasks efficiently.
2. **Medium Term Schedules:** a month's period is considered appropriate to schedule a medium term goal. This can be divided into weeks and set a goal to be achieved each week. If your work cycles every month then you can use it as a snapshot for next month as well.
3. **Short Term Schedules:** daily schedules fall in this category. They keep a track of what all has been accomplished successfully till date. This is a specified schedule because you must make it very clear about what you have to do each day of the week. With the help of short-term schedule you may even identify where you lack in your time management skills.

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## In Tray Exercise

1. Show the following slide to the participants (Slide no 37):
2. Ask them to open page no. 57 of their workbooks.
3. Tell them that this is a role-play exercise where they will play the part of a busy bank manager who has to manage his time by clearing some backlog items on his desk.
4. Explain the situation as mentioned below:

Your assistant has left behind 13 documents on the desk for your attention. The items include letters, e-mails, reports and web pages that are related to daily office work. There are varieties of Issues. There is a list describing the summary of each item in one of the following pages. All the items are to be reviewed and you have to write the following:

- A list of actions that will be taken by you, including the analysis of the key issues in each item on your desk.
  - You need to prioritize each item. While doing so you have to use these categories: High priority, medium priority and low priority. You must focus on the urgent tasks that are to be completed within short period and the important issues that need attention for the good of your business.
  - Decide whether you have to send an item to your colleagues or a meeting should be called.
5. Explain the role of the manager as mentioned below:

You are Robert Anderson and through the Management Trainee Program, you have been given a berth in Jubilee Bank. Since the completion of the training, you have been engaged as a Team leader at the Downtown Road,

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Houston Branch. You had to complete Management Trainee placements in numerous branch operations and various Head Office functions.

Jubilee Bank is a small bank that provides various products and services to end customers in the state of Texas. The bank is headquartered in Houston. Each branch comprises of two teams to provide services and sell different savings, credit card products and mortgages in the following segments: Regular and HNI ones.

As you have been able to show your prowess in your present role, the Regional manager requests you to help the Museum Road branch in the outskirts of Houston. Your role there will be to work as an **Interim Retail manager**. What you have to do is to manage two Team Leaders and enhance the revenue of the branch in order to save it from financial losses. Your promotion has opened before you the avenue of showing your management skills. Note that the Branch Manager has declared his inability to assist you due to his hectic schedules. You have to shoulder this project and take necessary decisions completely on your own.

The branch has had a shortage of management supervision, as the past Retail Manager went on stress-induced sick leave at the end of March 2012. There are many urgent issues that needed clarification. As per the instructions of the Branch Manager, you have to update her regularly on all the issues (particularly the important ones). You have assistance from your Personal Assistant, George Gray, who has left thirteen items on your desk for your perusal.

Today is Monday, the 5<sup>th</sup> of November 2012 – your first day as Jubilee Bank's Interim Retail Manager.

6. Tell them that they have to go through all the documents listed on page no. 62 of their workbooks.
7. Tell them that they have 90 minutes to complete the task.
8. Tell them that they should spend the first 5-10 minutes to review the documents to determine which one needs top priority.
9. Tell them that there is a template on page no. 82 where they can place the actions and the ratings of the priorities.

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10. After the exercise, discuss the answers as mentioned in the workbook page no. 90 onwards and give them feedback.

11. Explain to the participants that the answers provided there discuss the important issues raised in the in-tray and the required/appropriate actions to resolve these issues. The answer to each issue is not the only answer but only one of the approaches to look into these issues.

The length of the answer is related to the type of the issue and the time given. Therefore, the length of the answer varies.

One needs to address the high-priority issues first before looking into low priority issues. You need to ensure that the relevant issues/problems have been identified for each item and the action plans chalked out to address the issues/problems.

Each answer is followed by 'Notes' section in italic which gives additional explanation(s) of the issues.

12. The answers are given below for reference :

Item No	Key Issues and Recommendations	Priority (Hi/Med/Low)
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1.	<ul style="list-style-type: none"> <li>• Introduce myself to all the employees in the bank.</li> <li>• Talk to HR Manager and discuss plans for filling up vacant Sales Executive post.</li> <li>• Call George Gray, the assistant and appreciate him for keeping the necessary items for review.</li> </ul> <p><b>Notes:</b></p> <p><i>The organizational chart is an important document as it indicates the names and titles of the employees working in the organization. It will be easier later while reviewing the other items. It will serve as a ready reference for understanding the roles and responsibilities of employees.</i></p>	High
2.	<ul style="list-style-type: none"> <li>• Call the Branch Manager, Jennifer Martin and thank her for the memo.</li> <li>• Ask her if it is possible to have a meeting with her to discuss about the RBI visit.</li> <li>• Instruct George Gray to schedule Innovation Group meetings once in a month. Ask him to inform about these meetings to all the employees.</li> <li>• Ensure that all the employees attend these meetings by sending an email and request them for their ideas for the meetings.</li> </ul> <p><b>Notes:</b></p> <p><i>As the item is from the branch manager, keep it as a reference while you review the rest of the items.</i></p>	High

3.	<ul style="list-style-type: none"> <li>• Send an email to the group and express confidence that they can achieve the desired targets.</li> <li>• Express willingness to share experience related to sales.</li> <li>• Mention that the company is going to start a scheme wherein top performers are awarded for their efforts every month.</li> <li>• Send an email to the Branch Manager and the Finance Manager indicating the quarterly sales trends. Mention that I am going to improve the performance and request her to provide any inputs/comments on the trends.</li> <li>• Ask George Gray to get additional details like Regional and National Sales data from Head Office in order to analyze the bank's performance.</li> <li>• Set up regular meetings with the retail teams and request the teams to update me about the issues prior to these meetings. Inform all the team leaders that I will interact with them after these meetings.</li> <li>• Ask George to set up weekly meetings with the team leaders. Also, ask the team leaders to send a copy of email whenever they hold meetings with sales executives.</li> <li>• Check with the Finance Manager, Ferguson Baker whether the sales figures could be reported on a weekly or monthly basis. This helps to monitor the sales figures on a continuous basis and gives time to take corrective actions.</li> </ul> <p><b>Notes:</b></p> <p><i>Note that there are no sales figures for the last quarter for Alex Reed.</i></p> <p><i>Instead of reviewing the data in detail, focus on the trends. While looking at team performance review details, this information will be quite useful.</i></p>	High
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4.	<ul style="list-style-type: none"> <li>• Instruct George to schedule a meeting with Jessie Taylor and find out her view on Alex Reed's resignation. Find out why the performance of Alex has deteriorated (Item 3). Investigate Jessie Taylor's responses and look into the reasons Alex cited in his resignation letter.</li> <li>• Also, ask Jessie for any suggestions in order to improve the situation and make her understand the need for retaining Management Trainees.</li> <li>• Check with HR Manager whether there was an exit interview and know whether he was aware of any issues like working relationship between Jessie and Alex.</li> <li>• Send an email to all to assure all the team members that development opportunities would be provided for the staff and appraisals would be conducted regularly. This issue is appropriate in view of the response given by the employees (Item 5).</li> </ul> <p><b>Notes:</b></p> <p><i>Note that your Branch Manager in his welcome letter asked to develop Sales Executives (Item 2). This is an important role a manager needs to play. Also, check for any other evidence for the issues raised by Alex. Look at the date on the resignation letter and explore the possibility of stopping Alex from leaving the company. Also, keep in mind the constraints being faced by the HNI team, as the one of the positions is vacant for a long period.</i></p>	Medium
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5.	<ul style="list-style-type: none"> <li>• Talk to HR Manager and discuss about the Opinion Survey results and ask for a detailed report. Check whether there is any action plan to address these issues. Ask the manager to conduct another survey after six months to check the improvement.</li> <li>• Send an email to the Branch Manager with a copy to Area Compliance Officer (Item 12) and express his commitment in educating staff about the need for explaining customers regarding the risk associated with any investment.</li> <li>• Inform HR Manager, David Hill and the team leaders that regular meetings will be held with everyone in the team with an objective to improve sales and the work culture in the company.</li> <li>• Request HR Manager to decipher the chart and its significance.</li> </ul> <p><b>Notes:</b>  <i>The survey results are related to the branch as a whole. While looking at other items, these results will be useful and serve as a ready reference. It would be better to interact with HR regularly while interpreting these results.</i></p>	Medium
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6.	<ul style="list-style-type: none"> <li>• Ask HR Manager to conduct refresher training programs for the management trainees, focusing on the importance of company values, customer delight, team work, etc.,</li> <li>• Based on the survey results, ask HR Manager to conduct another values training session for other branch colleagues.</li> <li>• Mention to HR Manager that one idea for improving attendance in the training sessions is to provide lunch for the participants, if budget allows.</li> <li>• Some graduates mentioned that the experience they had with other branches' was excellent. Ask HR Manager whether it is possible to get the ideas from those branches and check whether any job rotation is possible. Also, request him to find out the cost of implementing of the ideas.</li> <li>• Ask HR to start a scheme where company's successes are celebrated together.</li> <li>• Ask employees to volunteer for organizing monthly social activities and get ideas from them. This is a nice way to promote the work culture.</li> </ul>	Low
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7.	<ul style="list-style-type: none"> <li>• Ask team leaders whether all team members have been imparted the required training. If not, make necessary arrangements to enable them complete the training.</li> <li>• Talk to everyone in the team, assure them that I am keen in their development, and indicate that suitable arrangements are being made in this regard. Ask HR Manager for details on my team's performance reviews and any formal appraisals. This will be useful in addressing the shortcomings identified in item 5.</li> <li>• Send an email to my team members (Teams dealing with HNI and Regular Customers) and stress the need for identifying cross-selling opportunities. Ask them to help each other in this endeavor.</li> <li>• Stress the need for working as a team and maintaining a positive attitude. Inform that team-building events would be organized to promote teamwork regularly.</li> <li>• Ask George Gray to schedule meetings with each Sales Executive and Team Leader (Starting with Jessie Taylor) for discussing the performance of the team. Suggest ideas and provide support to enable them meet their targets.</li> </ul> <p><b>Jessie Taylor</b></p> <ul style="list-style-type: none"> <li>• Congratulate Jessie for the excellent results. And stress the need for increasing the sales performance from remaining executives. With an open mind, find out the details on</li> </ul>	High
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	<p>working relationship between the team members.</p> <p>Emphasize the importance of working as a team. Find out the reasons why Regular Customer Team is accusing HNI Customer Team.</p> <ul style="list-style-type: none"> <li>• Coach Jessie Taylor regularly and ask her to adapt her working style suiting to the needs of the team members so that the group performs well. Ask Jessie to share the experiences and the techniques with others for improving the sales performance. Check with Jessie whether she needs any kind of mentoring from another manager.</li> </ul> <p><b>Lisa Thomson</b></p> <ul style="list-style-type: none"> <li>• Appreciate Lisa for her teamwork. Mention that customers liked her approach (Item 13).</li> <li>• Delegate to Lisa one of my projects to promote Jubilee Bank's values framework across the Branch.</li> <li>• Check with Lisa the reasons for the lower performance against targets. Indicate that I am interested to provide opportunities for development to all the team members. I ask whether she needs any support to enable her achieve the desired targets. I inform that there is a need for increased monitoring of sales performance.</li> </ul> <p><b>Stephen Scott</b></p>	
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	<ul style="list-style-type: none"> <li>• Appreciate on the consistency of his sales performance and his team’s positive results – particularly Tina’s performance.</li> <li>• Find out the reasons for missing desired targets and mention that I asked HNI team to focus on selling to their respective customers. Stress the need for meeting the targets in spite of prevailing economic conditions. Inform that I will be monitoring the sales performance on a regular basis.</li> <li>• Tell him not to neglect Tina Williams’ development.</li> <li>• Discuss the ways Stephen deals with Gary Wilson and Tina Williams. Suggest that Stephen uses the same coaching skills that he has used so effectively with Tina Williams to improve Gary’s sales performance.</li> <li>• Explain the importance of mentoring another manager, like Jessie Taylor and mention that Stephen is the ideal person in the company for mentoring. Tell him that if both he and Jessie Taylor work together then the branch will scale new heights.</li> </ul> <p><b>Gary Wilson</b></p> <ul style="list-style-type: none"> <li>• Tell him that I heard very good feedback about his work. Check with him about how he feels like working for the Bank. Find out the issues and the constraints he is facing. Ask him about the support and guidance he is getting from</li> </ul>	
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	<p>his line manager. Suggest that he can learn from Tina's experience. Offer him my support to enable Gary achieve the targets.</p> <p><b>Tina Williams</b></p> <ul style="list-style-type: none"> <li>• Congratulate Tina for her excellent sales performance and mention that a positive feedback was given by the previous Retail Manager. Inform about the identified opportunities for her career development. Stress the need for working as a team and ask her to mentor Gary to close difficult sales, as this would help her in future.</li> <li>• Update Branch Manager on the outcome of talking to the team members. Suggest that if Jessie Taylor's team-working approach and lack of managerial support does not improve, other ways of measuring their performance are to be looked into.</li> </ul> <p><b>Notes:</b></p> <p><i>It is clear that Jessie Taylor is least bothered about the effectiveness of his staff and their development. To address these issues, it is required to involve HR department. HR will explore ways to address the weaknesses of these individuals.</i></p>	
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8.	<ul style="list-style-type: none"> <li>• Contact the customer and apologize for the delayed response and for the actions taken by Tina Williams. Thank the customer for bringing the issue to my notice.</li> <li>• Tell the customer that I am the new Retail Manager and introduce myself as the new Retail Manager of the Bank and inform that the customer delight is the major priority for me.</li> <li>• Reassure the customer that Jubilee Bank complies with the rules and regulations specified by RBI. Mention that I am personally looking into the matter.</li> <li>• Ask the customer to approach me as and when required. Stress that the branch values all its customers and their feedback.</li> <li>• Ask George to schedule a meeting with Tina in order to discuss the issue. I will take a copy of the letter to the meeting and explain clearly to Tina about the complications that may arise because of this issue.</li> <li>• Tell Tina about the need for explaining the features of both the products to the customers. Mention that the company is not interested in short-term benefits. Customer delight is the top priority.</li> <li>• Ask her to review the records of other customers who have bought the same loan Product and inform me whether they have been informed of the redemption penalty.</li> <li>• Review Tina's compliance records, alongside Area Compliance Manager. This will enable me to take the appropriate actions with Tina in line with the procedures of</li> </ul>	High
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	<p>the branch.</p> <ul style="list-style-type: none"> <li>• Talk to Jennifer Martin, Branch Manager to check whether reimbursement could be made (Payment Protection Penalty or Early Redemption Penalty) as this needs to be done for avoiding an investigation by RBI.</li> </ul> <p><b>Notes:</b></p> <p><i>The date of the complaint is an important factor to consider as it indicates that no action has been taken for a long period. Though it is a single complaint, it may be an indication of other issues too. It also offers an opportunity to think in a broader perspective and result in ways to minimize negative impact.</i></p> <p><i>It is important to ensure that all the team members are strictly following all the bank's compliance procedures. For this, all the team members should be given compliance training. Items 2, 5, 7 and 11 also indicate the same viewpoint.</i></p>	
9.	<ul style="list-style-type: none"> <li>• Plan to meet the Marketing Manager, Samuel Davis and discuss the marketing focus on HNI Customer products. Take his feedback on increased marketing of Regular customer products in future.</li> <li>• If Samuel Davis agrees, look to swap some of the HNI marketing with Regular marketing in the near future.</li> <li>• Talk to Jessie Taylor and understand his viewpoint. Schedule a meeting with the Branch Manager and discuss about the needs of Regular and HNI customer segments in detail.</li> <li>• In view of the prevailing economic scenario and sales performance, I suggest increasing focus on Regular customer sales and mention that the fall in HNI customer sales could be due to the prevailing economic downturn.</li> </ul>	Medium/Low

	<p><b>Notes:</b></p> <p><i>While following emails, it is better reading from the bottom one first. Note the dates and times of the emails. Note that the responses came in quick succession.</i></p>	
10.	<ul style="list-style-type: none"> <li>• Ask George to schedule the next Innovation Group Meeting (if not done earlier; item 2).</li> <li>• Ask Team Leaders during briefing sessions about the way the team members feel about the Innovation Group Meetings.</li> <li>• Tell them that I am surprised at the low attendance of the last meeting and ask them for finding out ways to overcome any constraints.</li> <li>• Ask them to share the responsibility of chairing the meetings. Ask one of them to prepare agenda and the other to take notes and chair the meeting.</li> <li>• Ask to add the following to the agenda for the next meeting : <ul style="list-style-type: none"> <li>- Jubilee Branch to hold competitions for the best ideas suggested by the employees.</li> <li>- Forming groups that look into the performance of</li> </ul> </li> </ul>	Medium

	<p>other branches.</p> <ul style="list-style-type: none"> <li>- Inviting Retail Managers from other branches which are successful</li> <li>- Discussing customer complaints as this is important and not addressed in the earlier meeting.</li> </ul> <ul style="list-style-type: none"> <li>• Ask Stephen to discuss about his perception of competitors' web sites in the next meeting and ask him to check with his sales executives and come up with the best ways to address the concerns of the customers.</li> <li>• Ask Stephen to prepare a list of costs and pros/cons of his sales initiative ideas.</li> <li>• Suggest that Jessie Taylor prepares a business plan for assigning personal bankers to each HNI customer and presents this to the Branch Manager. Ask the Team Leaders to work together for implementing this initiative once agreed.</li> <li>• Email Branch Manager and explain the importance of signing off the Sales Executive recruitment campaign – indicate that you talked to HR.</li> </ul> <p><b>Notes:</b></p> <p><i>Note the times, dates and attendances of meeting minutes to understand the context. This one was about a month ago. It lasted for only 1 1/2 hours and only a few people attended the meeting. Note that there was no representative from the HNI team. So the discussion could be biased.</i></p> <p><i>These meetings are held monthly so we are due another soon. Keep this in mind when organizing the next meeting (responses to</i></p>	
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	<p>item 2).</p> <p><i>Use the opportunity to develop an Innovation Group agenda to show that you can generate some innovative ideas of your own.</i></p> <p><i>Take the opportunity to evaluate the networking opportunities that are listed – rather than mentioning that all or none should be progressed.</i></p>	
11.	<ul style="list-style-type: none"> <li>• Ask George to schedule a joint meeting with Jessie Taylor and Stephen Scott after having one-to-one meeting with them.</li> <li>• In the meeting, I will discuss the queuing problem and other issues related to teamwork. Make them understand the implications of these issues.</li> <li>• Ask them to strive for better customer experience. Explain them the importance of teamwork and its benefits. Ask the Team Leaders about branch procedures in this area. Ensure that both play an important role so that the team workers work together without blaming one another.</li> <li>• Ask Jessie Taylor and Stephen Scott to start a system wherein the members of the team are rewarded for their contribution towards improving teamwork.</li> <li>• Discuss with both Team Leaders about the positive contributions made by MTs.</li> </ul>	Medium

	<ul style="list-style-type: none"> <li>• Agree that Jessie is not free to attend training programs and stress that it is equally important to attend compliance. Suggest that both of them appear for RBI's professional compliance qualifications as a part of their career development plans.</li> <li>• Inform the Branch Manager and Operations Manager that I know of the queuing problem. I will tell him that I spoke to the concerned team leaders and assure that the similar situations would not happen again.</li> </ul> <p><b>Notes:</b></p> <p><i>It is clear that the allocation of resources is not adequate. Items 1, 3 and 10 also confirm this view. Understand that the Procedures Manual is missing and also be aware of the attitude of employees towards compliance training. Make them understand the need for attending the compliance training. (Refer to Item 12 answer).</i></p>	
12.	<p>Instruct George to send all training requests within the next 2 days in order to guarantee places for all the team members to enable them attend the compliance training. Also, ask him to obtain the course dates from the training department and inform them the participants to make a note of it and attend the training programs.</p> <p>Priorities would be as under:</p> <ol style="list-style-type: none"> <li>1. Sales Executives to attend Compliance Training Sales Accreditation Course (Level 2) and Team Leaders to attend Compliance Training Sales Accreditation Course (Level 3).</li> <li>2. Team Leaders to attend additional training courses like <u>Making mentoring work</u> (Jessie Taylor and Stephen Scott) and <u>Managing Staff</u> (Jessie Taylor)</li> <li>3. Sales Executives to be given the most appropriate additional training like <u>Talking to Customers with Confidence</u> (Lisa and Gary), <u>Understand All That Your Customer Needs</u> (Lisa), and</li> </ol>	Medium/High

	<p><u>Making Mentoring Work</u> (Tina Williams).</p> <p>Send an email to the retail team and promote RBI's training courses that are recognized as a professional qualification. Also, indicate that the fees for the courses will be reimbursed Copy this to the Branch Manager. Check the possibility of running the RBI professional qualification courses at the branch.</p> <p><b>Notes:</b></p> <p><i>Many issues are raised till now. This training workshop memo is a very good opportunity to improve the performance of the branch. It gives an opportunity to identify suitable training programs for the team members.</i></p>	
13.	<p>Send Email to both the Team Leaders and tell them that I am giving importance to the compliance issue across the branch. Ask for their view about linking any future compliance violations to the bonus system.</p> <p>Email Branch Manager and Operations Manager to highlight that:</p> <ul style="list-style-type: none"> <li>- Staff manning the Enquiries Desk is facing problems on Saturdays. They could not manage the customers on Saturdays. Check whether the recruitment of sales executive will help. Discuss whether procedures are to be revised.</li> <li>- Discuss with them the idea given by Stephen – assigning personal bankers to HNI customers. It may reduce the number of customer complaints.</li> </ul> <p>Send this Operation Manager's Memo to Stephen. Suggest him to include few comments given by the customers in his presentation to the Branch Manager.</p> <p>Ask George to talk to the Operations Manager, Thomas Young and find out how recent these comments are. As there are no dates on</p>	Medium/Low

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	<p>the comments, it is possible that few of them are irrelevant.</p> <p><b>Notes:</b></p> <p><i>There are no dates indicated on these customer comments but since George has kept it for your attention, you can assume they are relevant. Show that you are interested to learn from customers' feedback and devise a proper system to address their issues.</i></p> <p><i>All the issues raised in this item relate to other previous items. The queue problem was raised previously in Item 11. This issue is here escalated to the attention of the Branch Manager. Now It is known that the Enquiries desk was also unmanned. More potential compliance issues surface in this last item (HNI Gold Card, Student Overdraft Facilities).</i></p>	
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Now show the following slide (Slide no 38):

Thank the participants and ask them to fill up the feedback forms.