

Completed Staff Work

(From an IBM Staff Management Development class in 1982 attended by Roger Moore)

"Completed staff work" may be defined as "the study of a problem or issue (assigned or self-initiated) and the presentation of the results in such a form that all that remains to be done by the manager is to approve or disapprove the COMPLETED work" .

The word "completed" has been emphasized because the more difficult the problem is, the greater is the tendency to present the problem and its solution to the manager a piece at a time rather than in its completed form. Completed staff work includes a complete statement of the details of the problem.....problem definition. It is your responsibility as a staff member to work out those details. You should avoid consulting your manager in the determination of those details, no matter how perplexing they may be. You may (and should, if helpful or necessary) consult with other staff members and associates. The product or result, whether it be a memo, presentation material, or simply a reply to a request, should, when presented to your manager, be worked out in finished form.

Completed staff work BEGINS with a complete understanding of the request or question. A solution which doesn't fit the problem or an answer that doesn't match the question, can occur if "assume" is substituted for "understand". Asking questions and/or restating the request are good methods to ensure that you are ready to start in the right direction. Often a manager will ask for a specific piece of information without explanation. This is an opportunity for you to ASK "why" or "what" is really being sought, so that you can provide a complete response to the manager's request. Resist the temptation to allow your manager to do your work for you. Your manager should not have to analyze information which you provide, that is your job.

An impulse which comes often to the inexperienced staff member is to ask the manager for the solution. This occurs more often as the task grows more difficult. It may be accompanied with feelings of frustration on your part. It is so easy to just ask your manager what to do, and it appears so easy for the manager to answer. STOP! This is your job. Resist the impulse to ask for the solution. It is your responsibility to advise your manager, not to ask for solutions or direction on what you ought to do. Your manager needs answers, not questions. Your job is to study, analyze, write, restudy, review and rewrite until you have evolved a SINGLE proposed action or reply; the best of all you have considered, not a list of alternatives from which you ask your manager to choose. Your manager should merely be asked to approve or disapprove your solution or recommendation.

Do not bother your manager with long explanations or memoranda. Writing a memo to your manager does not constitute a completed assignment, but writing a memo or report FOR your manager to send to someone else does. Your views should be presented to your manager in finished form so that your manager can make them his or her own with a signature. Often, a completed assignment results in a single document prepared for signature without accompanying comments. If comments or explanations are desired, they will be asked for. However, you should be prepared to provide those answers to whatever level of detail is necessary to demonstrate or justify your recommended actions or conclusions.

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The theory of completed staff work as it pertains to self-initiated study does not preclude a "rough draft", but the rough draft must not be a "half-baked" idea. The formulation and presentation of the work or idea should be complete in every respect except it need not be neat or in its final form or media. A rough draft should not be used as an excuse for shifting the burden of analysis or formulation of action to your manager.

When you have completed your assignment or self-initiated project, the final test is this: If you were the boss, would you be willing to sign the memo you have prepared? Would you be willing to make this presentation to the president of the corporation? Are you willing to stake your professional reputation and career on it being right?

If your answers are in the negative or even doubtful, take it back and work it over because it is not yet completed staff work.

The following are additional tests you should make to help assure that the staff work you have done is truly complete:

1. IS MY WORK WORTHY OF REPRESENTING ME AND MY MANAGER TO THE HIGHEST LEVELS OF THE COMPANY?

You need to understand that you put your career and reputation up for review with the QUALITY and ACCURACY of your work. There is a great possibility that the work you performed will not stop with your immediate manager, but instead, will be passed up to higher management as information or a recommendation. This not only puts you on the line, but also your manager.

2. HOW QUICKLY AND EASILY WILL I BE ABLE TO PRESENT AND EXPLAIN THIS STAFF WORK TO MY MANAGER?

A test for clarity, ease of understanding, continuity, availability of complete backup, etc. should always be applied BEFORE the material is presented to your manager. In most cases, getting it done on time is not as significant an issue as is completeness. It takes longer to do it over than it does to do it right the first time.

3. WILL I BE ABLE TO REFER TO THE STAFF WORK SIX MONTHS LATER AND COMPLETELY UNDERSTAND IT?

Your work needs to be able to "stand alone" and "stand the test of time". It needs to be as clear and understandable several months from now as it is today. To help assure longevity of clarity, a little time should be taken to assure that all the identifying labels of columns, numbers, etc. are indicated and make sense. All pertinent information should also be identified to simplify reconstruction of its original meaning. Each page should be dated and labeled with the title of the project or subject matter.

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In addition, the following are a few things to be conscious of:

- A. Avoid investing time in "half-baked" ideas. They take up your time as well as your manager's, and accomplish little.
- B. Be careful of giving "off the cuff" answers that do not instill confidence in the receiving party. It may, at times, be necessary to "wing it", but if (when) you do, immediately research the question and your answer. If correct, confirm; if incorrect, remedy. If there was a lack of confidence displayed with the original answer, go back and reassure your manager after you have done your homework and determined the facts.
- C. Check for unanswered questions in your "finished product". These are a certain indicator of incomplete staff work.
- D. Be cautious of too frequent or too many check points during the assignment. The staff assignment given to you has a desired end result. The means and ways to get to that result should be left to your discretion. Check points encourage a manager's involvement in the analysis. Depending on the length of the assignment, a midpoint check might be all that is necessary. If the assignment runs longer than a week, checkpoints on a weekly basis should be initiated by you to ensure your manager is aware of your progress.

NOTE: I have carried this document around as a hard copy since I received it in 1982 and have made copies and distributed it to many people over the years. Back then there was no MS WORD.....but through the magic of scanners, I was able to capture this document in electronic format and clean it up to the best of my technical ability for broader distribution....there are still some technical flaws in the way this document is put to paper but the message is one that if learned early, or late in your career, will help you present your thoughts and ideas in the best fashion.

Roger Moore