

Top 10 Templates & Checklists

Team FME



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Welcome



I'd like to personally thank you for subscribing to the FME Newsletter that gives you regular updates on the new management material available FREE from our website and the special offers we find for you.

Our free eBooks, Templates and Checklists have been written and designed so that you get sound practical advice on how to approach the most common management tasks you will face in your career.

They are organized into key skills sets such as finance, productivity, strategy, leadership, communications, coaching, career and project management.

This document describes the ten most popular templates. These templates are the most popular downloads requested on our website and each one is designed to help you perform your role more efficiently.



Helen Bristoll

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Introduction

The role of a manager has become more complex and the breadth of skills an individual must have to succeed has expanded considerably. You can no longer just be a subject expert; you must have a working knowledge of key management skills.



Knowledge in the form of market intelligence is the life-blood of organizations and managers are constantly asked to supply such data to aid in the analysis of the internal capabilities of an organization. Managers must have excellent written and verbal [communications](#) so they can express themselves competently when discussing:

- [Financial](#) principles and statements
- [Strategy](#) and planning
- [Project Management](#)
- [Leadership](#) and [productivity](#)
- [Sales](#) and [marketing](#)

Being able to express your decisions and requirements in the language of each discipline above has become a basic requirement of any manager. Our FREE management resources will help you acquire the level of such skills needed to perform your role effectively.

Whether you need the detail of an eBook, the guidance of a checklist or template to help you perform and manage a specific task www.free-management-ebooks.com website has a free resource you can download onto your PC, Mac, laptop, tablet, Kindle eBook reader, iPhone or Smartphone.

Top 10 Management Templates

The following ten templates are the most popular downloads requested on our website and each one will help you to perform your role more efficiently.



You no longer have to create your own template or wonder if you've thought of everything you need to do to perform a task the knowledge you need is at your fingertips.

1. [Workload Negotiation](#)
2. [Prioritize Personal Goals](#)
3. [Written Communications](#)
4. [Prioritize Tasks](#)
5. [Successful Delegation](#)
6. [Team Leadership](#)
7. [Performance Improvement](#)
8. [Questioning Technique](#)
9. [Meeting Minutes template](#)
10. [Communication Style](#)

Before each template there is a description of how it will aid your performance and some background information to clarify its purpose if you are using it for the first time.

Workload Negotiation Template

This [Workload Negotiation](#) template will help you to present an evidenced argument to your manager as to why your workload should be adjusted.

Anyone who has worked for a boss in any capacity has been in this situation before. You want to do a good job and take on every task that is assigned to you – but at some point it just becomes too much. So how do you tell your boss that you can't take anymore without coming across as a whiner or a bad employee?



It is a delicate situation to be sure. If you speak up, you risk looking bad in the eyes of your boss. If you don't say anything, your performance may suffer while trying to get all of the work done and this could reflect poorly on you with your boss for a different reason. When handled properly, your boss will respect you for speaking up and understand your side of the situation.

Use the following three tips to make sure you approach this situation correctly the next time it comes up.

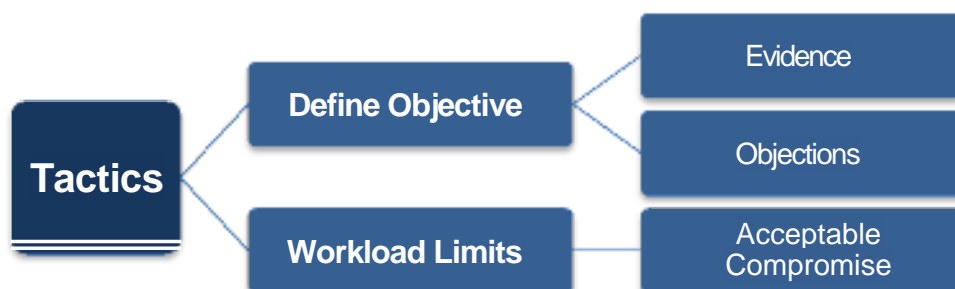
1. Catch the Problem Early

By far the most important part of this situation is saying something before it becomes too late. For example, if you have multiple projects assigned to you and wait until they are due to tell your boss you are overworked, that is not likely to be met with a good response. You need to speak up right away at the first sign of overload.

In fact, it is a good idea to plant the seed with your boss before you truly feel you have been given too much work. When you are assigned an extra project, it can be helpful to say something like

“I can take this one on, but won’t have much more time for anything else.”

This way, you are accepting the assignment, yet also pointing out that your time is being stretched thin. Hopefully, your boss will remember the comment and look to someone else the next time an additional task needs completing.



2. Have Your Facts in Place

Simply walking into your bosses' office and saying you are overworked won't be a good strategy. If he or she has assigned you all of the work, they obviously think that you can handle it.

Before confronting them with this problem, take some time to organize your case. Detail how long each part of your job takes to complete, and show them that there are simply not enough hours in the day. Hard facts are difficult to argue against, so building a logical case is a great way to demonstrate your oversized workload.

3. Team Up with a Co-Worker

You are probably not the only employee in the office that feels overworked by what your boss has assigned to you. The complaint will carry more weight if two or more of you have a meeting and air your concerns as a collective unit.

The important point in this case is that you are all united in the complaint, and won't be arguing amongst yourselves during the meeting. Your boss needs a workforce that is motivated and satisfied, so a group of employees that all feel overworked is something that will surely draw attention. Frame the meeting in a positive light that is concerned with the overall good of the company. Keeping it upbeat will help prevent the finger pointing and arguing that can sometimes result in this scenario.

Before you speak with your boss about being overworked, make sure that you really are. Ask yourself:

- Am I focused 100% of the time?
- Do I use & allocate my time wisely between tasks?
- Do I use the resources available to me effectively?

If you are confident that your performance is spot on and you truly have too much to do, think about the three tips above and speak with your boss confidently about this situation.

Workload Negotiation

Task	Deadline	Cause of Issue	Evidence	Proposed Solution
1.				A
2.				B
3.				C

Workload Negotiation

Task	Deadline	Cause of Issue	Evidence	Proposed Solution
4.				D
5.				E
6.				F
Date:	Agreed by Manager:		Agreed by Individual:	Chosen Solution:

Prioritizing Personal Goals template

The [Prioritizing Personal Goals](#) template allows you to define your own aspirations and helps you identify any inter-dependencies between them.

All successful individuals always have a detailed set of personal goals they are striving to achieve, so help set your career on the right path by defining your own goals. Without goals in place, you are more likely to simply wander through your professional life with no true sense of direction.



Taking the time to establish your goals will help you in every aspect of your life but especially your career. It will be easier to stay the course in tough times and coming out on the other side exactly as you had hoped. Most people have several different aspirations, some may be linked others conflict. Some examples could be:

- Career – become a director by 35 years old.
- Academic – attain an MBA.
- Personal – become fit or lose weight.
- Relationship – find a partner or start a family.
- Leisure – visit Australia or go on a cruise.
- Financial – pay off car loan or mortgage.

It is unrealistic to expect to be able to achieve all of these simultaneously, so it is fundamental to decide which aspirations are the main priorities.

One of the bigger hurdles involved with setting goals is deciding which ones are most important and deserve your top priority, and which can be put on the back burner for the time being. Having an exact order, or ranking, of your personal goals is almost as important as creating the goals in the first place.



While this might seem like a difficult task at first, you will be surprised at how easy it is once you spend some time thinking about it. Following are three simple steps to help you successfully rank your personal goals.

Step One: Identify the Most-Important Professional Goal

This actually should be a very quick and easy process. Once you have made a list of all the goals that you have for your professional life, review the list and choose the one that is your ultimate goal. It might be achieving a specific position within your organization, landing a position in a different organization that you dream of working for, or even reaching a certain salary plateau. Whatever that one 'big' goal is, you will probably be able to point it out pretty quickly.

This goal should land at the top of your priority list and guide everything you do when making career decisions. In order to stay on path over a long period of time, you have to know what direction you are heading – so place

this goal at the center of your sights and keep it there until it has become a reality.

Step Two: Separate Short and Long-Term Goals

On your list of professional goals, you likely have some that relate to the next few months on the job, while others relate to several years down the road. Make two columns and separate out the goals by which ones are less than one year in scope, and which ones are longer than a year. If you aren't exactly sure how long some of them will take, just make your best guess and pick a category.

The purpose that this step serves is to make sure that you have enough of both short and long-term goals. A goal list with only long-term goals is easy to forget about because you won't be accomplishing any of them in the near future so you will simply forget to use the list at all and it will fade off into the past. Likewise, a list with only short-term goals lacks the foresight to get you where you want to go. You might be able to check off some short-term accomplishments but you may become frustrated at the lack of a clear plan to long term accomplishment.

Step Three: Short Term Gets Priority

Generally speaking, you want to put more priority on your short term goals because those are the ones you are working to achieve on a daily basis. You should have a more long-term goal at the very top of your list then several short-term goals following in the ranking. This structure will help you to stay focused and work on checking as many of them off as you can. Later down the ranking, you can add back in more of your long-term goals so they remain present.

If you can get into the habit of reviewing this ranking once a month, you will be able to consistently update the ranking so that it reflects your present thinking. Don't be afraid to make changes to your priorities, or even your overall goals, as time passes. Things change fast in the professional world, and your career goals should adapt to remain realistic and attainable.

Simply ranking the goals that you have for your professional career can have a profound impact on the success that you achieve as the years go by. Be accountable to your goals and work hard to see them through – you will be rewarded in the end by seeing the fruits of your labor pay off with the accomplishments that you have been dreaming of.

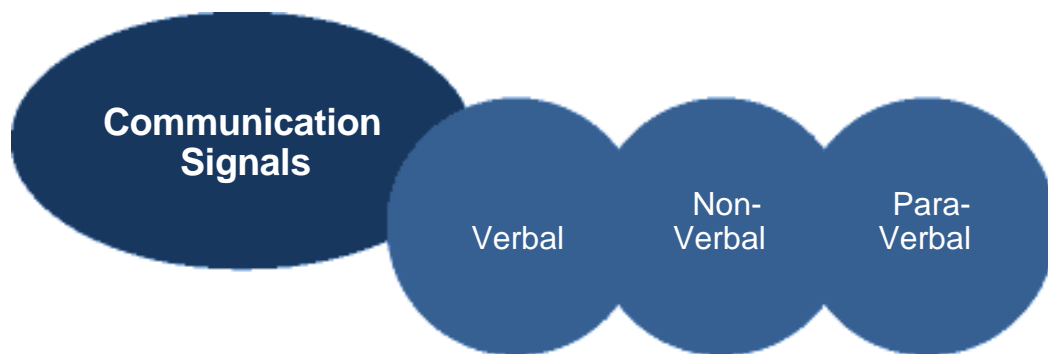
PRIORITIZING PERSONAL GOALS					
Aspect of Life	Goal	Target Date	Dependencies	Priority	Actions
Academic					
Career					
Financial					

Prioritizing My Personal Goals

Aspect of Life	Goal	Target Date	Dependencies	Priority	Actions
Personal					
Relations					
Leisure					

Written Communication Checklist

This [Written Communication](#) checklist will help you to produce written communications that have clarity, are easily understood and ensure your success whether you need to inform, educate or persuade your recipients. Written communication has two main aspects that of the layout and the words used. Both of these areas need to be appropriate for the situation and audience your document or message is aimed at.



The effectiveness of your team depends on the quality of your team and your ability to explain and get across complex ideas, messages, and instructions is paramount. You should not underestimate the impact of the spoken or written word. How you phrase your message and the actual words used can totally alter the meaning of your message.

The importance of your words increases tenfold when you are communicating in writing. This is because your reader or audience only has the words in front of them to ascertain your meaning and the required action. Making sure your para-verbal signals such as punctuation, grammar, spelling, and the structure of your sentences are correct is essential in written communication.



Your para-verbal abilities *must* reflect your level of authority. Poorly spelt or phrased sentences can be as detrimental to the communication of your message as shouting or excessive use of jargon. Make sure to use of these different elements such as bullets, capitalization, bold, etc. in the layout of your document for emphasis of key points. Presenting your argument in a logical manner is also a significant factor in communicating well in writing.

In the majority of cases you will want to use positive language, telling people what you want or can be done, rather than what you don't want or cannot be done. Remember when selecting your words to make sure that your choice portrays the level of authority and respect your communication requires. It is essential that your words convey the same meaning to all your audience regardless of their level of knowledge.

This checklist will help you to produce written communications that have clarity, are easily understood and ensure your success whether you need to inform, educate or persuade your recipients.

Written communication has two main aspects that of the layout and the words used. Both of these areas need to be appropriate for the situation and audience your document or message is aimed at.

Layout

- Must be clear
- Information easily identified
- Appropriate length

- Objective clearly shown
- Actions required with associated responsibilities plainly displayed
- Deadlines openly shown
- Version easily identified
- Additional or supporting information easily identified e.g. attachments, podcasts, appendices etc.

Words

- Appropriate for whole audience
- Easily understood
- Jargon free
- Spelt correctly
- Correct grammatical use
- Clarity of meaning
- Proper labeling of diagrams and images
- Evidenced arguments
- Clear references

Common Sections

- Circulation & Version
- Title
- Communication Objective
- Information and data – main body of communication
- Actions, responsibilities and deadlines

Before sending any Written Communication *always*

Have @ least 1
Draft

Proof read
message

Check Spelling &
Grammar

Before sending any written communication whether via email or hardcopy it is essential to perform three actions:

- ∞ Write at least ONE draft

- ∞ Proof read your message
- ∞ Final check of spelling and grammar

(Proof reading means checking your written words are spelt correctly, read as you wanted and convey the meaning you intended. It is not a simple scanning of your message.)

WRITTEN COMMUNICATIONS CHECKLIST

The written word is a vital skill all managers need as more and more communication is conducted in this form. It is essential that you can successfully communicate your message and gain the understanding required to achieve your objective whether in a report, instant message, text or email.

This checklist will help you to produce written communications that have clarity, are easily understood and ensure your success whether you need to inform, educate or persuade your recipients.

Written communication has two main aspects that of the layout and the words used. Both of these areas need to be appropriate for the situation and audience your document or message is aimed at.

LAYOUT	WORDS
<ul style="list-style-type: none">• Must be clear• Information easily identified• Appropriate length• Objective clearly shown• Actions required with associated responsibilities plainly displayed• Deadlines openly shown• Version easily identified• Additional or supporting information easily identified e.g. attachments, podcasts, appendices etc.	<ul style="list-style-type: none">• Appropriate for whole audience• Easily understood• Jargon free• Spelt correctly• Correct grammatical use• Clarity of meaning• Proper labeling of diagrams and images• Evidenced arguments• Clear references

COMMON SECTIONS

- Circulation & Version
- Title
- Communication Objective
- Information and data – main body of communication
- Actions, responsibilities and deadlines

NOTE BEFORE SENDING OR PRINTING ALWAYS:

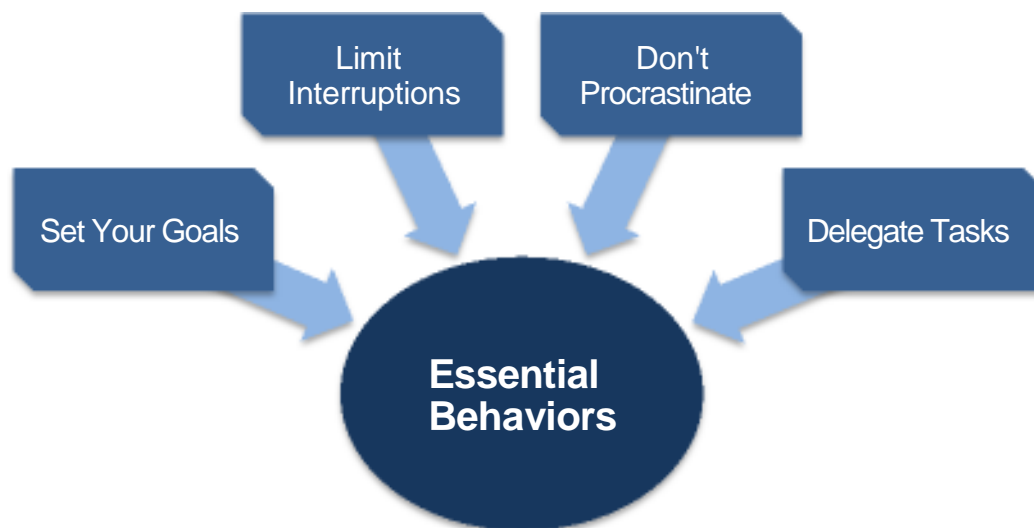
- Write at least ONE draft.
- Proof read your message.
- Check spelling and grammar

(Proof reading means checking your written words are spelt correctly, read as you wanted and convey the meaning you intended. It is not a simple scanning of your message.)

Prioritizing Tasks Template

The [Prioritizing Tasks](#) template provides you with a quick and easy way to prioritize each of your outstanding tasks according to their relative urgency and importance.

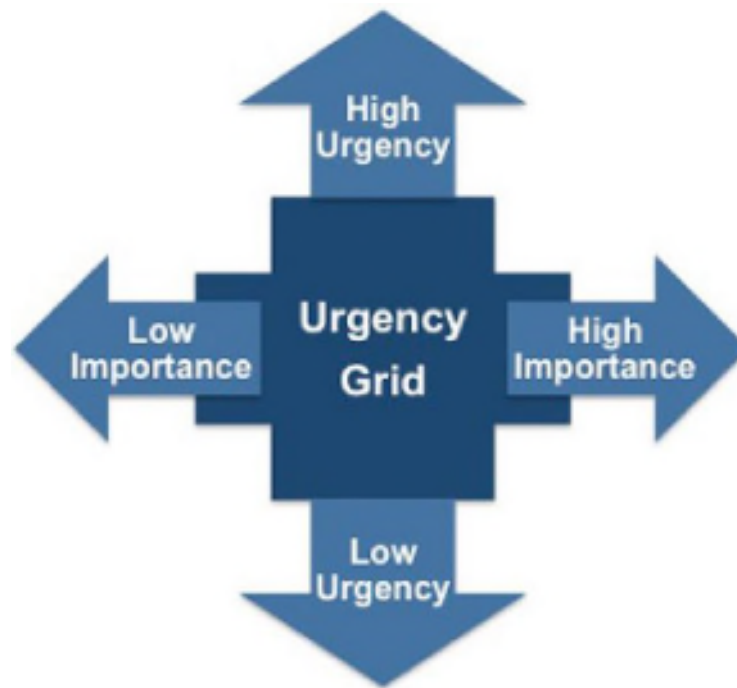
One of the most critical aspects of ensuring your work productively is that of managing the expectations of those you interact with. This covers a wide group of people – your manager, your team, suppliers, customers, agencies and other managers within your organization.



You know what goals you have to achieve and you know the best way to do this. So you need to communicate clearly and concisely with others involved in this process so that everyone understands what their role is, what they need to contribution is so that no-one is in any doubt of what the end result will be.

By focusing your attention and energy into setting clear expectations and maintaining clear communications throughout the process you will be able to be productive. When you manage someone's expectations you reduce the burden such people can imposed by interrupting you or causing your to procrastinate over how best to complete your assigned task.

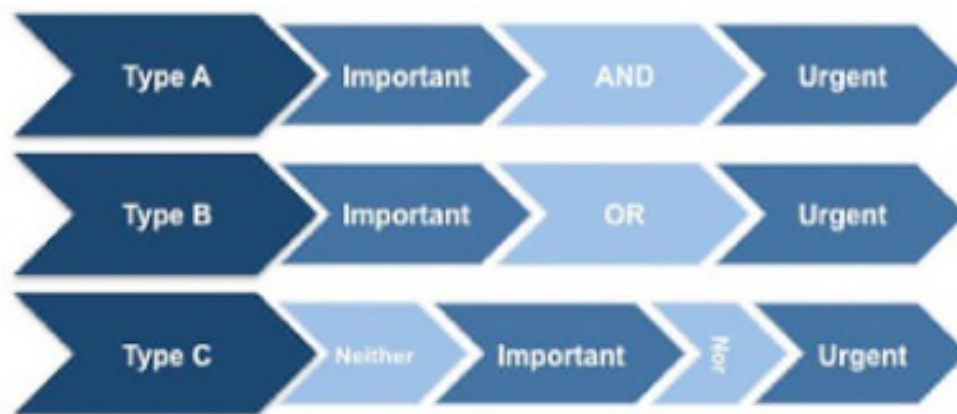
The Urgency/Importance Grid is one of those simple time management tools that require nothing more than a pencil and a piece of paper. Simply draw and label a grid like the one shown below. Then prioritize each of your outstanding tasks on it according to its relative urgency and importance.



Obviously this is not an exact science and represents a subjective judgment on your part. However, the resulting completed grid can be a significant aid to helping you prioritize tasks and avoid the common pitfall of confusing urgency with importance.

Whilst many factors can change to make any one of your activities more or less important, time is not one of them. An unimportant job remains unimportant, even if the deadline for delivery is in an hour's time. As you receive new tasks, you will revisit your grid, adding in the new task appropriately. This may mean that the urgency or importance of another task may be altered as a result of the new task.

Another method often used that requires less detailed an analysis of the individual tasks is the ABC Analysis technique. When scheduling a task you must decide which of the three categories it falls into. This simple method does not consider tasks them in relation to each other.



The guidelines of this method are:

- Aim to complete a few 'Type A' tasks each day.
- 'Type B' tasks should represent the majority of your day-to-day.
- Low-priority 'Type C' tasks should be fitted into your schedule, as time allows.

This method of prioritizing your tasks will result in final category *Tasks to Discard* and these tasks should be removed from your workload. It is good practice to address different types of task at various times of the day rather than working through all the A-tasks, followed by the B-tasks, then the C-tasks. This will enable you to have periods of the day when you are concentrating intensely, followed by periods where you can address less-demanding tasks.

Nearly everybody is subject to performance fluctuations throughout the working day. At certain times you will feel particularly energetic and alert, whilst at others you feel tired. If you can tune in to your own daily cycles then you will be able to plan the optimum times at which to tackle the different types of task.

PRIORITIZING TASKS

		High Importance	Low Importance	
Task is of high importance, with high urgency factor. Must be done today & to high standard. Action ASAP	High Urgency			Task is of low importance, with high urgency factor. These tasks need to be completed on time. ONLY spend sufficient time on them as not important. Don't be diverted
Task is of high importance, but has low urgency factor. By nature long-term so need to: <ul style="list-style-type: none"> • Set target if none exists. • Break-up into chunks of work 	Low Urgency			Task is both low in importance & urgency. Discard as many of these tasks as possible because they cause great harm to your productivity. Delegate if they develop another's KSA's.

Successful Delegation checklist

The [Successful Delegation](#) checklist outlines the correct process you should follow when delegating a task and reminds you of the three key principles of effective delegation.



One of the most important management skills you can master is learning how to delegate. As a specific skill, delegation is one that becomes increasingly more important as you progress through levels of management and will greatly increase your own productivity. There is no other skill that will increase your productivity to the same degree as being able to delegate successfully.

As a manager, you need to allocate as much time as possible to aiding the development of your business or service. This requires focusing a significant amount of your time on planning for the short-term and long-term needs of your organization; a strategy that in theory sounds good, but will undoubtedly in practice be replaced by any free time being overtaken with everyday operational tasks and problems.

Thus, if you can successfully reduce the amount of time you spend performing the latter through delegation the more time you will have to dedicate to the growth and planning of your organization. By delegating the

disruptive operational tasks to someone else who is equally capable of performing this role your productivity will increase.



Indeed, a key aspect of delegating efficiently is to ensure that whilst your time is organized more effectively, tasks must be allocated to suitable people to minimize risks, and to ensure the optimum outcome. By following three principles you will create opportunities to develop your team members increasing their morale and motivation.

Principle of delegation by results expected

The degree of authority delegated to an individual manager should be adequate to assure their ability to accomplish the results expected of them. Without this level of authority, they will be unable to complete the task, as others they need to interact with will hinder their progress due to lack of 'real' authority. It is essential that as part of the delegation process, you communicate this devolved authority to all necessary parties.

Principle of absoluteness of responsibility

It is vital that delegation is not used as way of avoiding or abdicating ultimate responsibility and ownership of tasks. Responsibility for the activities of subordinates, who have been assigned duties, remains at all times with whoever originally delegated the task.

Principle of parity of authority and responsibility

The degree of authority that is delegated in conjunction with the task has to be consistent with the level of responsibility and role of the subordinate.

As an initial step it is best to delegate:

- 1) Routine tasks.
- 2) Planned tasks.
- 3) Tasks that a team member has expressed an interest in performing.

For all of these, you should ensure that you have sufficient time within your workload to brief and explain exactly what is required. You must be mindful not to always delegate unpleasant tasks as this will not develop or motivate your staff.



It is also important to understand when you should not delegate. You should resist temptation to pass on tasks that have been delegated to you, as it is crucial to be able to control issues that arise and ensure they are resolved between you and the task owner.

Delegation should also not be used as a strategy to handle last-minute tasks. The nature of such a task does not provide sufficient time for you to control the risks involved or to provide a sound brief.

SUCCESSFUL DELEGATION CHECKLIST

This checklist outlines the correct process you should follow when delegating a task and reminds you of the three key principles of effective delegation.

With any task that you delegate you must ensure that:

- Level of authority is adequate to allow the individual to delivery the expected result. This must be communicated to all necessary parties.
- You retain ultimately responsible for and retain ownership of the task you have decided to delegate.
- The level of authority that results from your choice to delegate a task must be consistent with the level of responsibility and the role of the individual.

When delegating a task you need to follow the process and set the right environment.

THE PROCESS	THE ENVIRONMENT
1. Right Person – chose someone who has shown they possess the necessary competencies and behaviors the task requires, but will also develop them.	Full Responsibility Means the member has sufficient responsibility and is solely responsible for task's delivery.
2. Clear Goal – provide a clearly defined brief containing all the data they need with SMART goals. Ensure the person <i>understands</i> what is required and appreciates the tasks importance to the organization.	Focus on Results You need to focus on achieving the desired result and not on how the task is actually performed. To develop the member they must work in their own way.
3. Delegate 'ALL' – ensure the whole task is given to a single team member. State your reporting needs so you can monitor their progress <i>Never split a task.</i>	Full Resources Make sure member has all information and contact names required for the task. Ensure that adequate resources & finance are available.
4. Realistic Deadlines – clearly state the deadline date and the reasoning for this timeframe and any unknown factors so that the member accepts the delegated task.	Constructive Feedback Use positive messages and use objective language when you feedback to the member. Work with them to resolve any problems without placing the blame.
5. Regular Reviews – set these to coincide with key points of the task so that you can support and guide the task's progress. By carefully monitoring the task you can avoid over-reporting. <i>Always conduct a Task Debrief at the end.</i>	DO NOT take task back When approached for help, use questioning and objective language to help develop the members ability to assess problems and ascertain a workable solution.
6. Give Credit – ensure that you give full credit and thanks to the member for successfully performing the task. Make sure this is communicated at all appropriate levels.	Provide Support Clearly define at outset how you will support member by your actions and time. Ensure member knows they have your FULL support.
RETAIN CONTROL WHEN DELEGATING THROUGH GOOD MONITORING & CONSTRUCTIVE FEEDBACK.	

Team Leadership Checklist

This [Team Leadership](#) checklist reminds you of the behaviors and attitudes that you need to display in order to be a successful leader. Leadership can be described as ‘a process of social influence in which one person can enlist the aid and support of others in the accomplishment of a common task’.

There are many different theories about leadership styles, which have in turn produced different leadership models. The most important aspect of being a leader is deciding how much freedom to give your team. Too much, and they may not achieve their targets. Too little, and you will restrict their personal development and job satisfaction.



There is no easy answer to this problem and the best course of action is to consider each case on its merits with a clear appreciation of the risks involved of giving too much autonomy.

There are four practical leadership styles are:

- [Transactional Leadership](#)
- [Transformational Leadership](#)
- [Situational Leadership](#)
- [The Leadership Continuum](#)

You can learn about these in our [‘Team Leadership’](#) eBook which you can download free from this website or by clicking the title.

The fact that there are such a variety of possible types of team makes it impractical to generalize too much when discussing leadership styles. The diagram below shows three key facets that will play a significant role in defining your leadership style.



No matter which leadership style you prefer or the type of team you are leading there are four key behaviors that you must demonstrate in order to be seen as a credible leader – someone that people choose to follow.

1. Define success criteria
2. Lead by example
3. Value all contributions
4. Reward success

This checklist is something that you can use to help analyze your own behavior in these four key areas. Each behavior has two or three key facets associated with it. Spend a few minutes considering each area in turn and

noting instances where you have (or maybe haven't) displayed the appropriate behaviors.

This exercise is designed to be confidential and you should be completely honest with yourself when considering each behavior. It is very easy to neglect to do some of the simple things that can make a big difference to how your leadership is perceived by your team.

TEAM LEADERSHIP CHECKLIST	
BEHAVIORS THAT EMULATE SUCCESSFUL LEADERS	IDENTIFY YOUR OWN INSTANCES OF THESE BEHAVIORS
<p>Define success criteria</p> <ol style="list-style-type: none"> 1. Define and communicate your team's objective in a way that is easily understood by everyone. 2. Allow everyone in the team the opportunity to contribute in this process, regardless of their skill or expertise. 3. Ensure any success criteria are set at realistic levels, in this way the whole team will be able to 'buy into' them. <p>Remember, success can only be achieved if the team knows what it looks like.</p>	
<p>Lead by example</p> <ol style="list-style-type: none"> 1. You must exhibit the same professional behaviours to everyone you interact with, whether they are in or outside of your team. 2. Demonstrate the behaviours you expect from your team in all your own interactions. 3. Ensure that you allocate time to communicate and monitor your team informally <p>Contact time with your team will enable to more easily pick up on underlying issues and resolve them before they become serious.</p>	

QUALITIES OF SUCCESSFUL TEAM LEADERS

BEHAVIORS THAT EMULATE SUCCESSFUL LEADERS	IDENTIFY YOUR OWN INSTANCES OF THESE BEHAVIORS
<p>Value all contributions</p> <ol style="list-style-type: none">1. Show that you value each member's views of a situation regardless of their role.2. Ensure all views are heard and acknowledged by actively listening during meetings or discussions.3. By your example ensure viewpoints are well presented. <p>Avoid your team fragmenting by making certain everyone feels involved and valued</p>	
<p>Reward success</p> <ol style="list-style-type: none">1. Recognize an individual's or sub-teams contribution to the project or objective, both to the individual, the team and senior management.2. Reward this achievement success as best you can within your ability to make such decisions of this nature and your organization's culture. <p>It is key that any recognition you give is in proportion to the achievement attained.</p>	

Performance Improvement Checklist

This [Performance Improvement](#) checklist will help guide you through the steps you need to take to address any underperformance from your team. The most successful managers are those who can get the best out of their team. This goes for any business.

Whether you are a sports coach, a sales team leader, a department manager, or any type of front-of-line management, it is important to understand how to get the best possible performance out of your team. This is what separates successful managers from those who stay stuck at the first level.



Managers who get results almost always move forward... while managers who do not end up either spending the rest of their days at the same old position, or eventually losing their position due to the poor performance of their team.

Both of these questions are important, but there are a lot of angles to cover. Unfortunately, there are no 'easy' answers or formulas for such questions, though there are some absolutes that tend to play a big role in how effective your team is.

What Makes One Team Perform Better Than Another?

There are a lot of answers to this question, and a lot of factors to take into account when leading/managing a team. You need to think about a number of different things, and coordinate a lot of loose ends correctly in order to minimize waste and maximize efficiency. Your team needs to be properly motivated and inspired, but this is best done when you hire the right people.

[Building a successful team](#) generally starts with hiring the right people for the job. You need motivated, self-starting team members who are passionate about what they are doing. If they do not have a passion for the company, then you can help by motivating them and giving them a reason to work hard, which can be accomplished if you make them BELIEVE in what they are doing.



If they believe that they are doing something worthwhile, then they will be much more likely to put their heart and soul into their job... which is exactly what you need in order to have a team that actually gets results.

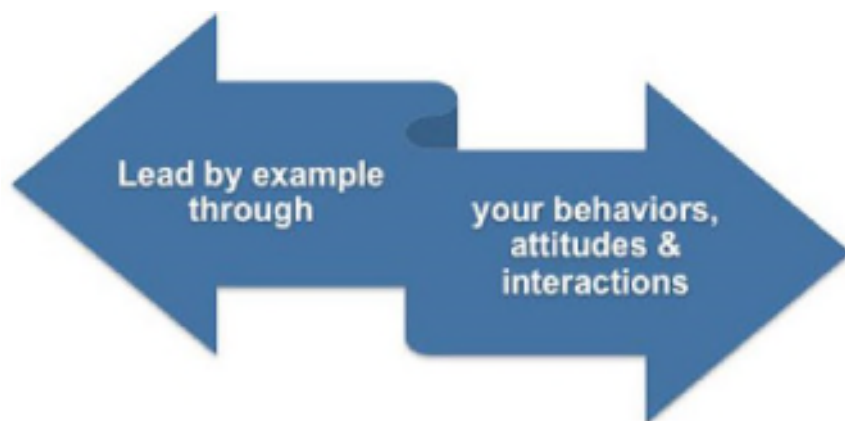
Your team also needs to be properly managed. They need the right resources, they need to have the freedom necessary to use their creativity, and they need to be placed correctly within the team so that their skills and abilities are utilized to their fullest potential. They also need to be treated fairly, and need to know that they are working towards something. If they have a goal in mind and know that there will be rewards for meeting that

goal, then they will be MUCH more likely to be motivated to do their very best.

Where Do Values Come Into Play?

Creating a team that possesses character is very essential to success. But where does this translate into better results for you as a manager? Well, if you put together a team that cares about the greater good of the company that they are working for, then they will be more likely to excel at whatever they put effort into. Whatever they are doing, they will be more likely to do it better if they, in the end, CARE about the company and whether or not it moves in a positive direction.

Values and character are two things that are more difficult to instill within employees, which is why it is SO important that managers make every effort to hire the right people in the beginning. Team selection is one of the most important parts of the process, and by surrounding yourself with good people who will give 110% to keep the company (and the rest of the team) headed in the right direction, you will realize that managing a winning team that outperforms the competition is not going to be nearly as difficult.



Leading By Example

Of course, the absolute BEST policy, on the part of any manager, is to lead by example. Don't assume or believe that anyone on your team is going to work harder or believe more in the company than you do! As a manager, it is your job to take the lead and to inspire greatness within those underneath

you. Leading by example is absolutely essential, but is one of the BIGGEST downfalls of most managers. If you can successfully show your employees, through your own example, what hard work and commitment look like, than inspiring them to embody the same character and outlook will become easier and easier.

PERFORMANCE IMPROVEMENT CHECKLIST

This checklist will help guide you through the steps you need to take to address any underperformance from your team.

Remember this will not happen over-night it takes time to re-establish good working relations within your team.

YOUR BEHAVIORS

Communications	<p>One of the most important aspects of any team is how it communicates. This is between its members and with those outside of the team.</p> <p>Communications must be two-way, open and honest.</p> <p>When communicating with your team you must:</p> <ul style="list-style-type: none">• Be specific and detailed when making a request.• Use the appropriate level and content of language.• Check for understanding.• Sum up goals in a way team can buy into.
Goals	<p>When defining the goals of the team and its members you must:</p> <ul style="list-style-type: none">• Clearly state the objectives you wish to achieve.• State the priorities assigned to different tasks.• Set each member and the team SMART goals that are motivating.• Through the appraisal process ensure that you develop each individual through a mixture of Coaching, Mentoring and Training.
Rapport	<p>You can only establish a good working rapport with your team members if you:</p> <ul style="list-style-type: none">• Have open and honest communications.• Gain the trust of each member of the team.• Restore the self-esteem of your members.
Lead by Example	<p>Show your team the KSA's (Knowledge, Skills & Attitudes) and behaviors you require from them by:</p> <ul style="list-style-type: none">• Supporting and helping members resolve issues.• Avoid blame to solve problems• Your interactions with other team members• Your attitude & Interactions with those outside of the team and organization.

TURNING PERFORMANCE AROUND CHECKLIST

STEPS REQUIRED TO ADDRESS POOR PERFORMANCE	
1. Know your team's history	<p>Look at previous appraisal forms to:</p> <ul style="list-style-type: none"> • Gain an appreciation of each members performance and their KSA's • Ascertain each person's development plan. • What training an individual has received and how its been used in their role, if at all. • Level of coaching and mentoring that has been offered to each team member. • Personally talk and make you own assessment of each individual, comparing this to what has been documented.
2. Get to know each individual	<p>Through open and honest communications with each team member make your own assessment of their level of:</p> <ul style="list-style-type: none"> • Self esteem. • Satisfaction. • Motivation. • Aspirations.
3. Build rapport & trust through Appraisal process	<p>Rebuilding the rapport with management takes time and consistency. To attain this you need to conduct:</p> <ul style="list-style-type: none"> • 360° evaluations for each team member at different levels appropriate to your team's role: <ul style="list-style-type: none"> • <i>By team itself,</i> • <i>Others within organization interact with,</i> • <i>Outside contacts the team members have dealings with.</i> • Appraisals for each person. • Set SMART goals to motivate members • Offer real coaching and mentoring to develop individuals • Use delegation to develop members KSA's with your support • Agree & deliver training to develop each person's KSA's
4. Reward good performance	<p>Ensure an individual receives the recognition that was outlined at the start of a task once completed successfully.</p> <p>You need acknowledge this:</p> <ul style="list-style-type: none"> • Personally • Within the team • Rest of organization • Where appropriate externally <p>Reward good performance within the constraints of your role & that culture of the organization</p> <ul style="list-style-type: none"> • Informal – e.g. cakes for team • Formal – bonus, meal on expenses, time off in lieu etc.
Performance improves as trust and self-esteem are restored within the team.	

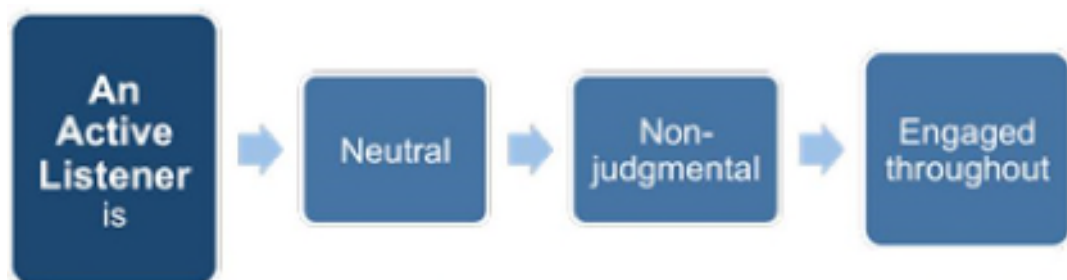
Questioning Technique Checklist

This checklist gives you five reasons to focus on developing your [questioning technique](#). It also explores the different types of questions you can use during your communications highlighting the most effective way to use each one.

Communication is an essential skill for any management professional and effectively use questions plays a significant role in this success. This checklist gives you five reasons to focus on developing your questioning technique. It also explores the different types of questions you can use during your communications highlighting the most effective way to use each one.

Every communication you have must have a clear and precise objective without this confusion and misunderstandings will occur. For your questioning technique to be effective you must actively listen to the exchange and remove all distractions from the conversation.

A deceptively simple concept called active listening can really help you to improve your communication skills. It was originally developed in the context of therapeutic interviews, but its principles can be applied to workplace communications.



Listening is the most fundamental component of interpersonal communication skills and is an active process in which a conscious decision is made to listen to and understand the messages of the speaker. As a

listener, you should remain neutral and non-judgmental; this means trying not to take sides or form opinions, especially early in the conversation.

Active listening is concerned with improving your ability to understand exactly what the other party means when speaking to you. This is not as straightforward as it sounds because active listening involves listening for meaning (specifically, the meaning perceived by the other party), not just listening to the words they use and accepting them at face value.

It also requires patience because people need time to explore their own thoughts and feelings before putting them into words. This means that short periods of silence should be accepted and you need to resist the temptation to jump in with questions or comments every time the speaker pauses.

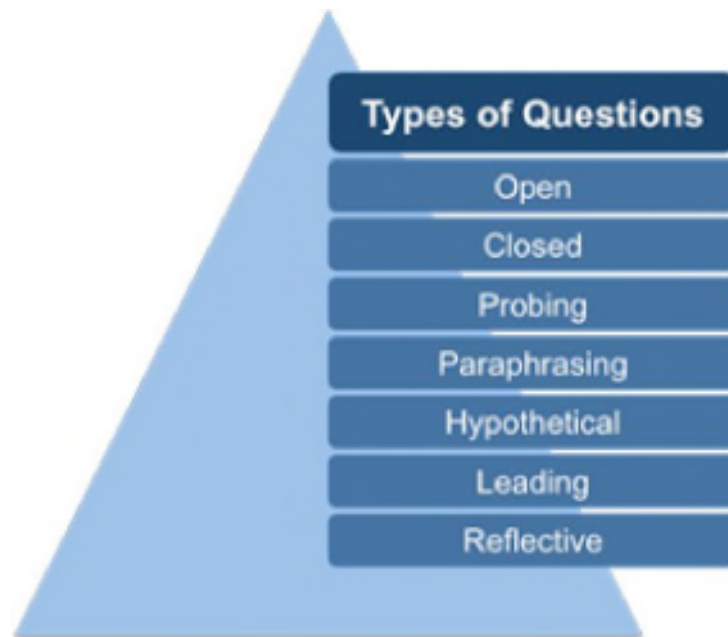


Asking ‘searching’ questions plays a significant role in your ability to draw out the information that demonstrates your message has been clearly understood and will be acted on appropriately. There are five reasons why developing your questions skills will promote your career aspirations.

- You have been understood as you intended.
- Your attention is 100% focused on the exchange.
- You are actively listening throughout the communication.
- You gain the appropriate commitment from the other party.

- ∞ Issues associated with your communication objective are fully explored.

Whether you need to clarify understanding, gain commitment or to overcome objections learning which type of question will best achieve your aim is essential for a successful manager. There are seven different types of questioning techniques shown in the diagram below that you can use to ensure you communicate successfully.



As you become more familiar with how and when to use the different style of questions your communication skills will enable you need to achieve your goals more easily. It is important that the type of question you use reflects the circumstances of the conversation. Your skill in this area will increase with practice and your willingness to reflect on how well your questioning technique achieved the aim of your communication.

QUESTIONING TECHNIQUE CHECKLIST

Communication is an essential skill for any management professional and effectively use questions plays a significant role in this success. This checklist gives you five reasons to focus on developing your questioning technique. It also explores the different types of questions you can use during your communications highlighting the most effective way to use each one.

Every communication you have must have a clear and precise objective without this confusion and misunderstandings will occur. For your questioning technique to be effective you must [actively listen](#) to the exchange and remove all distractions from the conversation.

By developing your skill in asking 'searching' questions you will be able to draw out the information that demonstrates your message has been clearly understood and will be acted on appropriately.

Developing your Questioning Technique

All communication is a two-way process and a critical part of that exchange is the ability to clarify that you have been understood in the way you intended. Using questions is one of the most effective ways to achieve this.

There are five reasons why developing your questions skills will promote your career aspirations. They are that

1. You have been understood as you intended.
2. Your attention is 100% focused on the exchange.
3. You are actively listening throughout the communication.
4. You gain the appropriate commitment from the other party.
5. Issues associated with your communication objective are fully explored.

Whether you need to clarify understanding, gain commitment or to overcome objections learning which type of question will best achieve your aim is essential for a successful manager.

Questioning Techniques

There are seven different types of questioning techniques that you can use to ensure you communicate successfully. The best situation for each technique is described below and includes a few examples of each question type.

As you become more familiar with how and when to use the different style of questions your communication skills will enable you need to achieve your goals more easily. It is important that the type of question you use reflects the circumstances of the conversation.

Your skill in this area will increase with practice and your willingness to reflect on how well your questioning technique achieved the aim of your communication. Your reflection does not need to be complex, simply ask yourself the five statements below.

- 1) Define what you want to attain from the conversation - *Information, Intelligence or Action?*
- 2) Decide the most efficient way to achieve this - *Enquiry, Probing or Directing?*
- 3) Adapt verbal and non-verbal signals to suit each questioning technique used.
- 4) Be flexible actively listen to responses and respond accordingly to ensure your aim is attained.
- 5) With hindsight would you change anything?

The answers you get will ensure you portray the appropriate behaviour and develop a strong questioning competency.

Open Questions

This style of question usually begins with *why, what, where, which and how*. They are most effective once a conversation is established and are frequently used to gather the information needed to attain your aim.

You should not appear judgemental, nor give the impression you are expecting a particular reply! For example:

'How helpful was that procedure?'

'What did you do to resolve the problem?'

'Why did you react to the customer's concerns in that way?'

Closed questions

These are questions that require a 'Yes' or 'No' answer. They are useful in drawing an issue to a conclusion and controlling conversations so that pertinent information is exchanged rather than personal views.

Too many closed questions will affect the flow and rapport, but in some instances an affirmative or negative answer helps summarize what has been discussed. For example:

'Where you aware that procedure had not been followed?'

'Was the customer happy with this result?'

'Did you know of this situation before?'

Probing questions

This technique is extremely useful in drawing out additional information and clarifying your understanding is correct of what you have heard. It is very effective in uncovering details that otherwise would have been overlooked or considered irrelevant.

It is important that your body language is perceived as supportive or neutral. If not, the exchange could come across as an interrogation rather than a discussion. For example:

'What would you have done differently?'

'Could you be more specific?'

'Who is involved in this situation?'

'Why do you think that?'

'How would someone outside the organization describe this situation?'

'What are your concerns?'

Leading questions

This type of question is best used in situations where you need to influence people's thinking or want to draw out a certain answer from someone. They are especially useful in training situations where you can guide an individual to see the importance of performing a task in a set way. For example:

'Do you think it would have been better to...?'

'Shouldn't we have done this instead?'

Be careful not to over use this technique as it can undermine your ability to empathize and build rapport.

Reflective questions

When you need to review a situation asking questions that enable an individual to reflect on how things could have been done differently is extremely useful. Reflective questions allow manager's to ask why an individual felt or acted a certain way without having to express an interpretation of the event.

Also by using exactly the same words in your question that you just heard gives the other person the opportunity to explore their knowledge of the situation. For example:

'You describe the situation as 'making you annoyed' why is that?'

"When you describe the other team 'as being disparaging' what do you mean?"

Hypothetical questions

Management are often faced with situations where they need to gauge how others in their team might act or think. Using the technique of asking a hypothetical question is an excellent way to discern this.

This sort of question offers individuals the opportunity to speculate and think about alternative ways to conduct a task. It also encourages people to propose new approaches or ideas to resolve an issue. For example:

'If you had no constraints how would you approach...?'

'Have you thought about what would happen if...?'

Paraphrasing questions

Another useful technique managers can use to check their understanding of what has been described or said to them is paraphrasing. This skill is especially useful when needing to draw an agenda item to a close and bring everyone's focus back to the purpose of the meeting.

This is where you rephrase what has just been said to you in such away that you are able to check you comprehension of the problem is correct. For example:

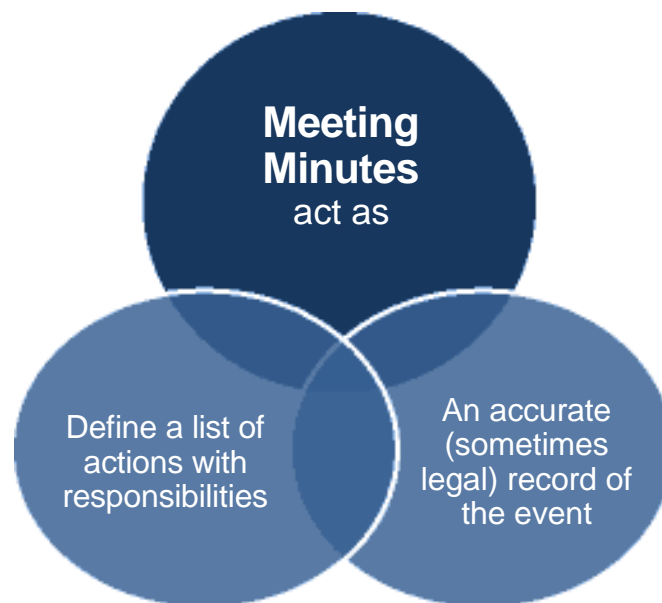
'So, by receiving the statistics from the IT department on the day you asked for them you would be able to meet your deadline. Is that correct?'

'The cause of each defect is due to the quality of goods supplied by X and if they meet the service level agreement the defects would disappear? Can you confirm this would be the case?'

Meeting Minutes Template

This [meeting minutes](#) template provides you with a structured means to record all essential discussion details and findings that have taken place during your meeting. They form a vital part of communications in an organization and ensure that all interested parties are aware of their own and others' responsibilities and timescales.

These notes can take many forms: they may be formal meeting minutes, or an email sent as confirmation of a conversation you and your colleagues have had in connection with a project or activity. For such notes to help you be effective they must be an accurate record of the main points discussed and detail any resulting actions, along with the person or persons responsible for them. Minutes should not be a transcript of everything that was said at the meeting.



They often have a legal role to play in organizations, for example, Annual General Meetings and in the operational management of contracts. While not intended to contain the complete details of an event, there are a number of items that should be included. Essentially, these will include the name of presenters, key topics covered, and a list of attendees. For a complete

description of what should be covered, check out our [free e-book on meeting minutes](#).

As a manager you are likely to spend a significant part of your week in meetings and you can't afford for the time and effort you invest to be unproductive or wasteful. A recent Management Today survey found that the average office worker spent *nearly half* of their 38-hour week in meetings and they said at least a quarter of that time was a complete waste of their time!

So your first responsibility is to make sure that each meeting you call or attend has a clear purpose with an agenda. Your agenda suggests the outline for the meeting minutes and to some extent predicts the results of the meeting. An agenda should be short, timed, simple, and clear.

Whilst meeting minutes are not intended to contain the complete details of an event, there are a number of items that should be included. Essentially, these will include the name of presenters, key topics covered, a list of attendees and related responses or decisions regarding the issues discussed.

Minutes perform several other roles:

- Establish accountability and provides a method of tracking actions.
- Verify whether or not a person was given a piece of information.
- Enables managers to track performance of individuals.
- Provides a historical record of agreements and acts as a central reference point.

Meeting Minutes Continuation Page

Date:		Meeting:	
Details		Responsibility & Timescale	

Communication Style checklist

This [Communication Style](#) checklist will help you to identify your own preferred communication style so that you come across with confidence and empathy. The ability to communicate is an essential life skill and everyone has their own style that they naturally adapt and develop to suit the different environments they operate in. Our need to educate, inform, persuade or entertain drives our communications.

Each person's communication style is a unique combination of their own innate skills and those learnt both formally and through experience. What makes some people better than others at communicating is their ability to adapt their style to suit the message, environment, and exchange.



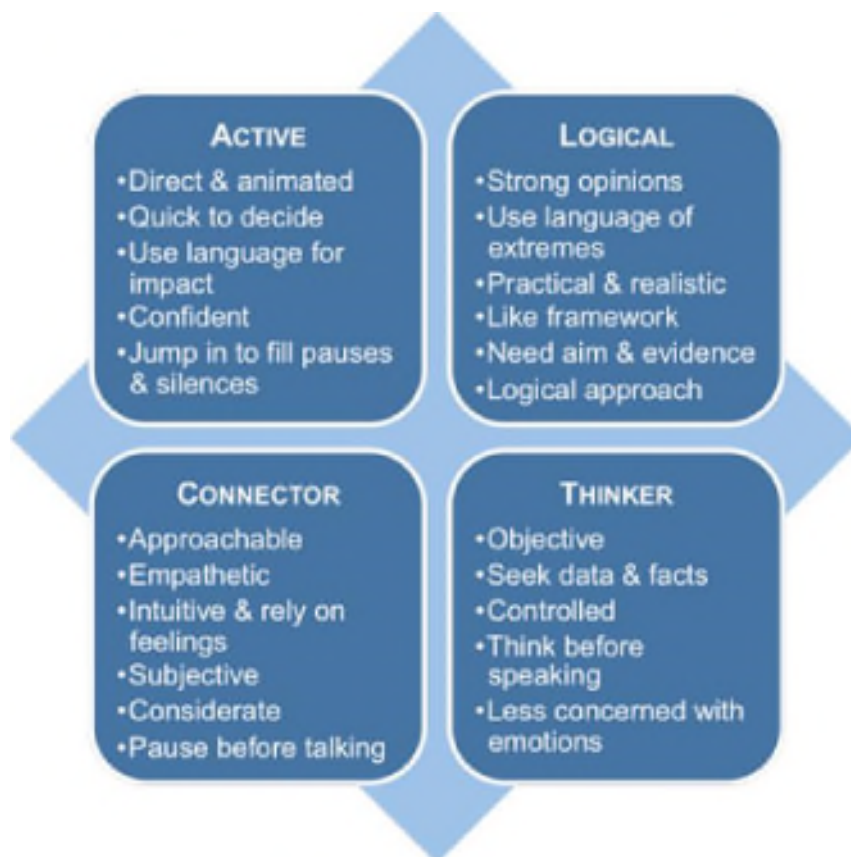
Whilst individuals may favor a particular way of communicating, they can alter their behavior to other communication styles if necessary to suit a particular situation. This flexibility helps them to come across as knowledgeable, confident, and empathetic. The more you are able to adapt your style to suit the situation and environment the more effective your communications will be.

Even if you are a naturally good communicator, there are always opportunities and ways to enhance your communication skills.

Individuals who are good communicators find it easy to develop empathy and trust with others. These people adapt their style of communication to suit the audience and situation they are presented with.

One of the most effective ways to develop and enhance your communication skills is to actively seek new opportunities that test your ability to adapt and push the boundaries of your usual style. The more you communicate in a wide variety of situations the greater your ability to deal with any communications environments regardless of the context or circumstances.

Communication is a complex two-way process that can involve several iterations before mutual understanding is achieved. Communication is a combination of words, symbols, pictures, graphics, voice, tone, facial expressions, clothing, and body language. By understanding how to use these elements effectively you can improve the way you communicate and achieve the best outcome for any situation.



There are four communication styles each with its own characteristics as shown in the diagram. When an individual uses a combination of all four depending on the circumstances this style is referred to as a 'Combiner'. Knowing your preferred style enables you to appreciate:

Firstly, how others might perceive you in an exchange.

Secondly, you will be able to identify the same attributes in those you communicate with.

This checklist will help you to identify your own preferred communication style so that you come across knowledgeably, with confidence and empathy.

To find out whether or not you favor a particular way of communicating read the statements and highlight those which best describe how you like to behave when communicating if there were no other aspects to consider and address. Be honest with yourself so that you get a true picture of your style. It is only by knowing how you really communicate that you will be able to develop your communication skills to suit any situation you encounter.

COMMUNICATIONS STYLE CHECKLIST

This checklist will help you to identify your own preferred communication style so that you come across knowledgeably, with confidence and empathy. The ability to communicate is an essential life skill and everyone has their own style that they naturally adapt and develop to suit the different environments they operate in. Our need to educate, inform, persuade or entertain drives our communications.

There are four basic communication styles that can be described by the way you act in the majority of your communications. Do you need to:

- Take a very active role in the communications.
- Connect and empathize with others.
- Have time to think and respond.
- Follow a logical path.
- Use a combination of the four.

To find out whether or not you favour a particular way of communicating read the following statements and highlight those which best describe *how you like* to behave when communicating if there where no other aspects to consider and address.

Be honest with yourself so that you get a true picture of your style. It is only by knowing who you really communicate that you will be able to develop your communication skills to suit any situation you encounter.

<p style="text-align: center;">ACTIVE</p> <p>When I'm talking I tend to miss others reactions because I'm so involved. I can express myself clearly. I interrupt a speaker if I disagree with what they are saying. I am happy to select a topic and pace for a discussion. I tend to talk more than I listen. I'm happy to talk or discuss a topic whilst doing something else. Talking about a topic is preferable to thinking about it. If my interest is not engaged I will try to end or divert the discussion I make sure my views are heard even if it means interrupting. I find my attention drifting if I get bored</p>	<p style="text-align: center;">LOGICAL</p> <p>I prefer to anticipate or deal with potential areas of confusion or conflict up front. My written communications get straight to the point. When I'm interrupted I lose my train of thought and find it hard to regain my flow. I do not like it when discussions stray from the point. When things are written down I am happiest. I take time to select the best way to communicate my message – face-to-face, call, memo, email etc. I am happiest when meetings follow a timed agenda. I like to have 'to do' lists so I can cross things off as they're done. Conflict in the work place is natural and I deal with it constructively.</p>
<p style="text-align: center;">CONNECTIVE</p> <p>Shifting off topic does not bother me. I frequently repeat statements to check my understanding is correct. I am aware and watch others body language when talking. I recognize if I am not being understood. I seek others to contribute by asking relevant questions. I am happy to listen to others rather than have to talk. I am watch others and alter my pace or language, for example, to ensure they understand what I'm saying. I can easily appreciate another's viewpoint. I will write several drafts when communicating important or sensitive information.</p>	<p style="text-align: center;">THINKING</p> <p>I consider the best way to present my views so others are receptive. I prefer to focus on facts and information. I express my viewpoint and ideas using charts and diagrams. I like to be in control of my gestures and posture. I take care to select the right words or phrases. I like to receive information that helps me to create or find a resolution. I find it difficult to know how best to deal with people when they become emotional. If I don't understand I prefer figure it out later rather than speak up. I find it hard to express in words my feelings and thoughts.</p>
<p>The section that you have most highlights in shows your preferred method of communication.</p> <p>Active / Connective / Thinking / Logical / COMBINER - If you have a similar number of highlights in each section.</p> <p>The more you are able to adapt your style to suit the situation and environment the more effective your communications will be.</p>	
<p>Your next step to develop and enhance your communication skills is to actively seek new opportunities that test your ability to adapt.</p>	

Other Free Resources

The Free Management eBooks website offers you over 100 free resources for your own professional development. Our eBooks, Checklists, and Templates are designed to help you with the management issues you face every day. They can be downloaded in PDF, Kindle, ePub, or Doc formats for use on your iPhone, iPad, laptop or desktop.

eBooks – Our free management eBooks cover everything from accounting principles to business strategy. Each one has been written to provide you with the practical skills you need to succeed as a management professional.

Templates – Most of the day-to-day management tasks you need to do have already been done by others many times in the past. Our management templates will save you from wasting your valuable time re-inventing the wheel.

Checklists – When you are working under pressure or doing a task for the first time, it is easy to overlook something or forget to ask a key question. These management checklists will help you to break down complex management tasks into small controllable steps.

FME Newsletter – Subscribe to our free monthly newsletter and stay up to date with the latest professional development resources we add every month.

Social Media - Share our free management resources with your friends and colleagues by following us on LinkedIn, Facebook, Twitter, Google+, and RSS.

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