How to get the most from your team in recessionary times

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Introduction and Welcome

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Trusted and Experienced
Objective

To provide some strategies for improving your team effectiveness to increase your bottom line.

So, what is happening in the current climate for accounting firms in regards to staffing?

What is your situation?
What are you experiencing?

So, how are you resolving your staffing issues?

“Well, that strategy didn’t work. Let’s try rubbing the magic bottle.”
Team Development

Two key components to developing a productive team

- Good Leadership
- Accountability
Good Leadership

- Clear path for the future
- Be an engaging leader
- Empower your team
- Lead by example
- Open communication
- Build trust and respect
- Be a situational leader
- Be professional

Accountability

- Prepare your dashboard with your KPI’s
- Set and share budgets with team members
- Job descriptions and clear defined roles
- Regular accountability meetings
- Delegate admin tasks to an admin person
- Establish the standard of how to perform certain tasks
- Training
- Performance management
- Feedback
- Rewards and recognition
- Continuous improvement
Create a Culture...

Culture

- Individuality
  - Develop strengths
  - Build skills

- Process for accountability
  - Job descriptions
  - Taking ownership
  - Continuous Improvement

Coaching Skills Matrix

<table>
<thead>
<tr>
<th>ENTHUSIASM</th>
<th>SKILL</th>
</tr>
</thead>
<tbody>
<tr>
<td>High 10</td>
<td>High 10</td>
</tr>
<tr>
<td>INSTRUCT</td>
<td>TRUST</td>
</tr>
<tr>
<td>SUPERVISE</td>
<td>MOTIVATE</td>
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</tbody>
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Lean Start-Up Model
Task management
• Managing your to do list
• Use of outlook to manage your tasks
Managing your ‘to do list’

1. Date the list
2. Every task entered on the ‘to do list’
3. Estimated time to complete
4. Estimated $ value
5. Priority / deadline
6. Plan your week every Friday afternoon or Monday morning
7. Schedule all appointment times first
8. Schedule week with 80% of tasks on the ‘to do list’ based on the priority listing
9. Regularly realign your planning
10. PLAN PLAN PLAN

Use of Outlook to manage your tasks

1. Open Outlook with your calendar for planning
2. Turnoff the email notification and sound – schedule times to look at emails
3. Each day plan 80% of tasks by blocking out time in your diary then you can add in the urgent ‘to do’s’ that come in
4. Once your day is planned then look at emails: < 2 min = do now, >2 min = plan in diary and/or write on the ‘to do list’
5. Drag ‘to do’ emails into diary or tasks
6. Don’t cc in every team member, arrange with them in advance if they want to see the emails
7. Be clear in your instructions if delegating a task
8. Detail the subject line so the recipient knows what it’s about, but don’t highlight sensitive information e.g. bank account details!
Outlook has many time management efficiency tools so take some time to explore the options

Summary

- Improving your leadership skills by:
  - Developing your vision
  - Become an engaging leader and empower your team
  - Build trust and respect
  - Understand the skill of being a situational leader and use the coaching matrix

- Establish a culture of accountability by:
  - Creating a dashboard of your KPI’s and measure your performance
  - Developing your capacity planner and provide budgets to team members
  - Clearly defined roles and frequent accountability meetings
  - Measuring the team members performance and conducting regular performance management reviews, using the coaching skills matrix
  - Creating a mechanism for feedback and, reward and recognition
  - Establishing a mindset of continuous improvement

- Follow the principles of the Lean Start-Up Model
- Task management through your “to do list” and the use of Outlook
Objective

To provide some strategies for improving your team effectiveness to increase your bottom line.

Please take 5 minutes to think about the significant learnings of today and share with your table.