

SUPERVISING IN AN AUTOMATED ENVIRONMENT



INSTRUCTOR GUIDE
1/2 -DAY COURSE

HRDQ[®]

SUPERVISING IN AN AUTOMATED ENVIRONMENT

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Instructional Design and Learning Philosophy

We are committed to providing the best core skills content possible for Instructor-Led Training (ILT). The following principles are applied in the development of programs:

Sound Instructional Design

All course content is developed using a variety of research techniques. These include:

- Brainstorming sessions with target audience
- Library research
- Online research
- Customer research (focus groups, surveys, etc.)
- Subject Matter Experts (SME)
- Interviews with trainers

Expert instructional designers create imaginative and innovative solutions for your training needs through the development of powerful instructional elements. These include:

- Learning objectives — effective tools for managing, monitoring and evaluating training
- Meaningfulness — connects the topic to the students' past, present and future
- Appropriate organization of essential ideas — helps students focus on what they need to know in order to learn
- Modeling techniques — demonstrate to students how to act and solve problems
- Active application — the cornerstone to learning — helps students immediately apply what they have learned to a real-life situation
- Consistency — creates consistent instructions and design to help students learn and retain new information
- Accelerated learning techniques — create interactive, hands-on involvement to accommodate different learning styles

Application of Adult Learning Styles

Adults learn best by incorporating their personal experiences with training and by applying what they learn to real-life situations. Our experienced instructional designers incorporate a variety of accelerated learning techniques, role-plays, simulations, discussions and lectures within each course. This ensures that the learning will appeal to all learning styles and will be retained.

Course timing

Chapter One: Balancing high tech and high touch

Type of Activity	Segment	Time
	Learning objectives	5
	Introduction: what's different	20
	A quick primer on time management	20
	Use a time log	10
	Establish a regular schedule	15
	Avoiding the trap of "hiding" behind your computer	5
	Handling interruptions and emergencies	20



Reading



Written Exercise



Facilitation



Group Activity

Chapter Two: Coaching and encouraging employees in the new automated environment

Type of Activity	Segment	Time
	Learning objectives	5
	Create quick coaching opportunities	10

Course timing (cont.)

Chapter Two: Coaching and encouraging employees in the new automated environment

Type of Activity	Segment	Time
	Increasing positive feedback	10
	Practice	20
	Supporting discouraged employees: Identify and overcome obstacles	10
	Supporting discouraged employees: Change negative self-talk	20
	Supporting discouraged employees: Build esprit de corps	10
	Special situations	10



Reading



Written Exercise



Facilitation



Group Activity

Chapter Three: Real-world application

Type of Activity	Segment	Time
	Learning objectives	5
	Learn from each other	30

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Course objectives

Successful completion of this course will increase your knowledge and ability to:

- Balance computer-based oversight with face-to-face supervision (high tech and high touch)
- Maintain visibility and relationships
- Coach and encourage employees
- Determine when to step in and review client cases on the spot

Course objectives

- Balance computer-based oversight with face-to-face supervision (high tech and high touch)
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ChapterOne



BALANCING HIGH TECH AND HIGH TOUCH

Learning objectives

Successful completion of this chapter will increase your knowledge and ability to:

- Develop a system that meets your need for undisturbed time and your employees' need for attention from you
- Analyze your time using a time log
- Use wise choices about how to use your time
- Handle interruptions and emergencies more effectively

Introduction: what's different

Benefits of using a new automated system

Challenges of using a new automated system

Adjusting to the new automated system

- “Chunk” it – tackle it in small pieces
- Teach others to cement the knowledge in yourself
- Celebrate small victories

Survival tips for learning new technology

Problem	Solution
I don't know where to begin.	
There's too much to remember.	
It all looks the same.	

Ice breaker activity: Benefits and drawbacks. Divide participants into groups of four. Ask them to introduce themselves and share a little bit about their work history, then tell them to come up with benefits and challenges of using a new automated computer system. For every challenge, they need to come up with a benefit. Debrief with the entire group.

Possible answers for benefits: Cases will be easier to review, easier to generate reports

Possible answers for challenges: time consuming, takes away from “real” work, coping with uncertainty -- fear of something new/of making mistakes, technophobia

Reasons for technophobia: Too much jargon, too much change too fast, too little preparation and training, fear is not seen as legitimate, no idea how to fix something (hardware or software) when it breaks

Survival tips: Brainstorm solutions to each problem with the group. Suggested answers: I don't know where to begin – break it into manageable chunks.

There's too much to remember – review frequently, test yourself, create a table or mind map, or some other organization tool, avoid mental exhaustion—take a break from learning

It all looks the same – stay actively involved, take notes or underline key concepts, compare notes with others

Survival tips

- Where to begin? *Break it into manageable chunks*
- Too much to remember? *Review frequently, test yourself, organize the information, take a break*
- All looks the same? *Stay actively involved, compare notes with others*

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Transition: When you're learning something new, it can be time consuming, so efficient time management is especially important.

1. "If you fail to plan, you plan to fail." Use a system that works for you – it doesn't necessarily have to work for others.
2. Specific, measurable, realistic, and achievable. The best goals cause you to "stretch" but not "break."
3. Once you set goals, you know what your priorities are (those tasks which help you achieve your goals). Flag items with a deadline to help you keep on track.
4. For many people, it works to make their list at the end of each day for the next day.
5. That's the time of day when you are at your best – use this time for your most difficult projects.
6. Can you delegate or eliminate any of your to do items? Will any of them fall off your list if you simply don't do them?
7. Focus on your goals and priorities, and believe they are important – that will help you say no to requests that you simply don't have time for (obviously, there is give and take and the occasional favor you want to do for a colleague or employee).
8. Break overwhelming tasks into small tasks, and do just one of them for 15 minutes.
9. Some things need to be closer to perfect than others, but perfectionism -- paying unnecessary attention to detail -- can be a form of procrastination.
10. Allow time for interruptions and distractions. You can't plan 100% of your day.

A quick primer on time management

1. Spend time planning and organizing
2. Set goals
3. Prioritize
4. Use a to-do list
5. Consider your "prime time"
6. Practice the art of "benign neglect"
7. Learn to say no
8. Conquer procrastination
9. Avoid being a perfectionist
10. Be flexible



Use a time log

Daily Time Log for :

Starting time	Description of activity	Evaluation of time use
8:00		
8:15		
8:30		
8:45		
9:00		
9:15		
9:30		
9:45		
10:00		
10:15		
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3:30		
3:45		
4:00		
4:15		
4:30		
4:45		
5:00		



Time log: Keep track of your time every day for at least one week to determine how you spend your time. Try to keep track of what you do in 15 minute increments. This may seem time consuming, but will ultimately help you use your time more wisely.

After collecting information, you need to evaluate how much time you are spending on your primary responsibilities. Label these as either high priority (HP) or low priority (LP)

Identify areas where you spend too much time (TT)

Identify areas where you do not spend enough time (NT)

Identify major interruptions (I) that keep you from doing what you want to get done. How can you eliminate them?

Identify tasks you are performing that you could delegate to someone else (D)

Look for crisis situations (C). Were they caused by something you did or did not do? Do you have recurring crises? How can you plan to help eliminate recurring crises?

Look for habits, patterns, and tendencies. Do they help or prevent you from getting the job done? How can you change them to your advantage?

List your five biggest time wasters (W). What can you do to eliminate them?

Establish a regular schedule

- "Open door" hours for interruptions
- "Closed door" hours for concentration
- "Out of the office" hours for time with employees

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One of the best ways to minimize interruptions is to establish regular times when you are available and when you are not.

Use "open door" hours for desk work that doesn't require a high level of concentration while you make yourself available to employees' and colleagues' for questions and concerns. Plan to spend about 50% of your time with open door hours.

Use "closed door" hours for work that requires a high level of concentration. This would most likely include your computer time generating and reviewing reports. Plan on spending about 25% of your time in closed door hours.

Use "out of office" hours for "MBWA" (managing by walking around) -- being out on the floor with your employees. "Out of office" doesn't mean you're away from work, just away from your desk. Plan on spending about 25% of your time out of your office with employees.

Activity: Ask participants to think about their daily commitments (meetings, etc.) and their prime time, and use that information to develop their optimal schedule. Ask them to commit to trying this schedule for at least two weeks. Encourage them to adjust it if they find it's not working, but to stick to an established regular schedule that everyone (they, their employees and their colleagues) will get used to.

Establish a regular schedule

"Open door" hours

Purpose:

Percentage of time:

"Closed door" hours

Purpose:

Percentage of time:

"Out of the office" hours

Purpose:

Percentage of time:

Activity: Your optimal schedule

Instructions: Thinking about your daily commitments and your prime time, jot down your optimal schedule for each day of the week.

Day	Open door hours	Closed door hours	Out of the office hours
Monday			
Tuesday			
Wednesday			
Thursday			
Friday			

Avoid the trap of “hiding” behind your computer

Acknowledge your learning curve ...

Post a humorous sign (“Slow zone,” “Learning happening here”)
Let employees know how it’s going

But don’t use it as an excuse

Get out there and listen to what employees are saying
Use the opportunity to encourage and support users of the new automated system
Be prepared to give on-the-spot help



It's easy to get caught up in the process of mastering the automated reporting system. Be aware of spending too much time working behind your computer, and not enough time working with your employees.



No matter how much planning and organizing you do ahead of time, interruptions will occur and emergencies will arise. Here are some tips for how to handle them effectively.

With employees, decide the difference between an interruption and an emergency. With everyone working on learning the new automated system, many questions will come up. But not every question is worth an interruption. You and your employees should decide together what is important enough to constitute an emergency requiring immediate attention.

Emergencies: The best way to handle emergencies is to have measures in place that will prevent or minimize them. However, realistically, emergencies will happen. Having a contingency plan is crucial – have you identified someone who can cover for you while you are handling the emergency?

Activity: Have participants work in groups of 2 or 3. Ask each group to decide the difference between an interruption and an emergency in their workplace, come up with at least one example of each, and write them on separate slips of paper. Collect all the slips, then read them to the entire group and see if the group guesses correctly. Jot them down on flip charts and mark the emergencies with a red dot and the interruptions with yellow.



Handling interruptions and emergencies

Be clear about the difference between an interruption and an emergency

Decide with your employees so everyone is on the same page

Handling interruptions

Supervisors: Use “open door” hours for non-emergency interruptions; be sure to have open door hours every day

What do employees need to be able to solve their own problems?

Employees: Is there anyone else who could help? Coworker, etc.?

Handling emergencies

Preventive measures

Crisis plan

Have back-up computer and phone capabilities

Emergency phone numbers: Appointed crises management team members, attorneys, police, public relations department, consultants, etc.

Medical supplies and CPR-certified employees

Recovery strategy

Activity: What are your emergencies?

Instructions: In your group, decide the difference between an emergency and an interruption in your workplace. Come up with at least one example of each, and write them on separate slips of paper.
