Key Activities

What are your key tasks and activities

Thinking about this you will need your staff to rethink what the tasks of their role actually do, rather than the task itself. This does two things, one it becomes less about the action and more about the delivery… that in turn means if it is forced to change or adapt you understand the end game still stays the same but the action may change.

Eg. If you are a receptionist a key activity is not to answer the phone (that is a task). A key activity would be to be the conduit between customers and stakeholders and our internal team.

Key Resources

What equipment or resources do you need to do your role, do those resources alter if you are working away from the office, is so how or what changes.

Stationary has changed, electronic letter heads, printers at your desk, multiple screens.

I would also consider this from a recruitment offer perspective.

If an innate requirement of someone's role is to document something, print it off, analyse it and then get signoff from their manager – how is that done remotely, does that limit flexibility, will the person need a specialised piece of equipment to do that job

People and Partners

What teams or individuals do you rely on to do your job (internal and external), these are not your customers, but those you work with or collaborate with to get your job done. The purpose of this section is to understand the level of autonomy or not in the role.

If you have a staff member that does not have anyone they rely on (they get a deliverable and do a deliverable), then changes to other work areas or individuals may not impact them too much, if someone's job is heavily reliant on someone else, then consideration must be given if the person or partner they changes … their role may also be impacted.

You should also consider the managerial/supervisory and collaboration requirements in this role. That is, if you have a senior staff member who needs to be around junior staff members for training, guidance (even just the absorption of general knowledge by overhearing their conversations with clients or others) their role cannot be autonomous and may impact on their full ability to work from home.

Key Stakeholders

Who are your key clients, customers and stakeholders. Importantly you also need to consider what their needs are. If the customer want/needs to connect with you in person, this may impact on the ability to work from home.

Core Value

What core value do you deliver, what problems do you solve? Why does your role exist?

This is a great one to have individual staff answer, both of their own role and/or other positions in the business. If they cannot tell you what benefit their role brings to the business or if they have no idea what someone else's role even does for the business, you can gather some important intelligence for future workforce planning and it also helps you to understand communication between different work areas

Service Standards

What standards do your customers expect?

Consider quality assurance principles, customer and client expectations, including the impact on your brand and/or company vision.

This is not about answering the phone in 3 rings (that is an outcome of the standard), it is about the customer experience.

Engagement Channels

What methods or channels do you use to interact with customers. If you are still sending letters, what impact does that have on equipment and resources for staff recruited and working from home. If everything is online, are their elements that can be automated

Skills & Strengths

What strengths and experiences are needed for this job and what skills and qualifications are required

This is a great one for identifying gaps on an individual and company wide basis. Conversely it opens up conversations around skills or strengths that the employee has that you may not be capitalizing on.

Key Deliverables

What need to be delivered to show that have done your job. This will generally be the result of the key activities.

Performance Measures

How do you know you have delivered your job requirements well? This one is important for production staff (sales people, staff with chargeable time etc. Often it is more difficult and more critical to your support staff.

It is important to articulate these so you can utilize this process for performance issues and for reward and recognition programs.