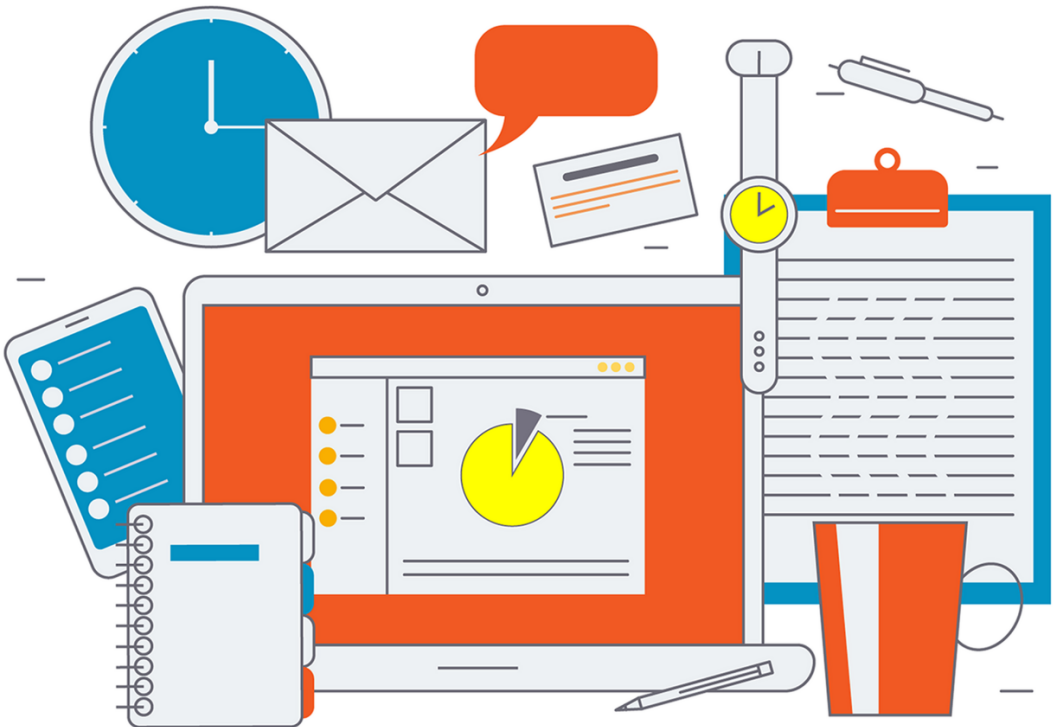


Sample
Chapter

28

MANAGEMENT TIPS

LONG-TERM SOLUTIONS FOR EVERYDAY
WORK SITUATIONS



ANIL KARAMCHANDANI

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25. How to Get a 5 (Excellent) in Appraisal?

How can you get a 5 (Excellent) in year-end Appraisal?

I wish we all knew.

In spite of the best efforts of HR to make the process transparent (starting with documented objectives for employees at the start of the year), our appraisal is still subjective.

A year is too long and what usually comes to mind at year-end are highlights – you will remember your biggest achievements; your boss will find it hard to overlook your ‘developmental need’.

But away from this tug-of-war over a 3 (Good) or 4 (Very Good) rating, the real question remains unanswered – *How to get a 5 in appraisal?*

The question is indeed difficult – even a boss will find it hard to (up-front) explain what will move him to give an employee a 5 out of 5.

And yet, some employees (5-10% of total staff) get a 5 out of 5 at year-end. They seem to have the killer instinct.

What about the rest of us? How can we develop that killer instinct?

Looking back, I practiced something that I now think could be an answer.

It is – Send an Achievement Email to your boss, every month

I agree - the solution seems lightweight and self-congratulatory, compared to the issue it seeks to address. But trust me, there is something incredibly powerful about it.

First, a sample –

To: Vishal Sir (Manager, Cash & Clearing Operations)

Sub: Update – April

Dear Sir,

I thought, going forward, I will send you an update on my work every month. Accordingly, please find my update for April.

Regulatory / Compliance

1. On RBI Circular ABC/123 – liaised with the Process team and Cheque printing vendor to incorporate additional MICR security features in the cheque stationery.
2. For better control, did a review of our department's audit observations of the last 3 years – and created a checklist of the same. It has 28 points.
3. Did a special check of Account Opening forms maintained in the vault. The project took a fortnight. 3 Forms are missing. Letters sent to the clients to re-execute the same.

Sales / Customer Service

4. Worked with the Sales and Process team to implement cash-pickup service for Star Shop (5 outlets) and Pizza House (8 outlets). The pickup is daily and has since started – Star Shop on 12 April, and Pizza House on 19 April.

5. Conducted a 2-hour training via conference call for 5 branches on 'Banking on Mobile' on 14 April. The training will help branch CSEs address walk-in customer queries.

Process Improvement / Cost Save

6. Liaised with 2 companies – Gemini Electric, and Murra Cements – to send us payment instructions thru 'Net Banking' – instead of physically giving it for manual processing. They have since 16 April started doing it. In the period 16 - 30 April, we have received 122 payment instructions through Net Banking. To that extent, our manual work has been reduced.
7. As discussed with you, coordinated with the Admin team to out-source the department's printing to a vendor. This will help us save Rs.45,000/- per month.

Issues / Lapses

1. A cheque – Nila Gems A/c 123456 – for Rs.25,000/- was returned for insufficient funds on 4 April, though the client had given standing instructions to break its fixed deposits for passing cheques. The issue arose as old standing instructions (managed in an Excel file) were not updated in the new Cheque-clearing system. This has since been done and reconciled.
2. 'NRI Cash Deposit Report' was not monitored for a week. Message received from the central team (22 April). Have since included it in my checklist and will ensure the same going forward.

Please let me know if you want me to focus on any specific issue or area.

Regards..

Pooja Arora

Officer – Cash & Clearing Operations

Apex Bank, Delhi

12 monthly emails like this – with 6 solid achievements in each (72 for the year) – and you will have made your case for year-end Appraisal.

To tell you the truth, I started this monthly Achievement email more as a response to a crisis.

I was given charge of a department – XYZ – and from day one, there were issues. Every second day, there would be an escalation – either from the Sales or the Service team.

My boss began to seriously doubt my ability to handle the department.

I knew I was learning, and putting plans in place for long-term improvement. But escalations – big or small – increasingly overshadowed everything I did.

So, I started the above, a kind of monthly report to my boss.

In it, I made sure to – apart from my achievements – include issues (lapses) also, as I wanted the boss to have an all-around, one-stop view of how I had performed in the month.

In due course, the operation stabilised, the perception changed, and I moved on – but I continued with the practice wherever I went.

Over the years, I have come to appreciate the hidden benefit of this monthly Achievement email.

Two ways it helps are:

1. It will force you to recall and list what you have achieved during the month.

In the office, other than Sales, with its month-on-month targets, all other jobs – Operations, Customer Service, Accounts, HR, IT – have a degree of subjectivity to them. The achievements aren't remembered. But now, because you have to list them in the Achievement Email, you will make an effort to note and quantify them.

2. Secondly, once you send the first email, you will have activated the treadmill.

Now, as each month draws (rushes) to a close, you will find yourself under pressure on what to showcase as an achievement for *this* month.

But this pressure will do you good. It will give your work an execution focus.

At work, you would have initiated or would be a participant in a lot of items. Chances are, most of it is stuck somewhere – far from closure. Earlier you didn't have an urgency – you could always say, *The counterpart is not responding, We have given the details and are awaiting a revert, We await a system patch for the issue, etc., etc.*

Not now.

Now you will pursue – you will send reminders, you will escalate, you will try to work out an interim solution, and where required, you will even nag your boss for a decision – all because you would want to close the item and show it as an achievement for the month.

And once you send the Achievement email, you will feel a sense of satisfaction, as I did, of a month well worked.

What is the assurance that the above practice will get me a 5 out of 5 in Appraisal?

No, there is no assurance. I say this with all humility.

There are times I have sent an achievement email and waited, but the appreciation never came. No, not even an acknowledgment.

But you have to have the faith.

This is not something that you will do for one year, one promotion, or one job. The drive that this generates in you - to pursue and close out things, every single day - is something that will help you for the rest of your career.

A couple of Do's and Don'ts based on my experience

1. Send your Achievement email by the 10th of the month (for the previous month).
2. Crafting the email will take time – possibly two hours – but it will be the best two hours that you will ever put in (each month) for your career.
3. Avoid generics in your achievement email. Instead, be specific. A sample:

Generic – “Handled spike in Pay order volumes”

Specific – “Handled 525 Pay order requests in a five-day period (8-13 April). Usually, we get 200 Pay order requests per week”

Ensure the achievements you mention are consistent with your job profile i.e. of high quality and importance.

4. In your email, mention your lapses also.

Though the lapse might already be known to your boss – the day that the lapse occurred – include it again in your monthly achievement email. The aim is for your email to be a one-stop view of how you have performed in the month.

5. In your email, avoid the predictable – a sort of MIS thing – saying the same thing month-on-month.

If you have to include such data – and some managers handle big departments where this could be a long-running format – put it concisely. Let your boss realise that your email will always have something interesting, and he will look forward to it.

6. *As the days and weeks pass by, go on collating your achievements in a draft email.*

Don't wait until month-end to remember what you have achieved during the month. Trust me, you won't remember even 25%.

Instead note it, as it happens, in a draft email. Once the month is over, use the data to craft a fine achievement email for your boss.

7. End your email with - "Please let me know any specific issue or area you want me to focus on."
8. If you are a manager overseeing teams, include a section to showcase your people development initiatives too.
9. In due course, if you are a manager, you can send the content (of your Achievement Email to your boss) to your team as a department update. This will help them to get an idea of what is happening across the department, the critical items, etc.
10. You can start this whether you are in – Sales, Service, Product, Operations, IT, Admin, or any other department.
11. You can start it any level, whether you are a – VP, Senior Manager, Manager, or in an Individual Contributor role.
12. If a monthly email feels overwhelming, you can start with a Quarterly email.

Why you need to be proactive when it comes to Appraisal?

I recently read *Work Rules!: Insights from Inside Google That Will Transform How You Live and Lead*, by Laszlo Bock, Google's head of People Operations.

With some recent articles questioning the performance rating system (bell curve) in companies, I wanted to know how Google – a new-age and wildly successful company – appraised its employees.

Google continues to top the charts in *Fortune's* '100 Best Companies to Work For'. The survey, done by the Great Place to Work Institute, is primarily based on employee feedback. So, it's worthwhile to see what Google is doing right.

On the appraisal, as I understand from reading the book *Work Rules!:*

1. Google has a rating system, on the lines of 1 – 5.

They categorize it as:

1. Needs Improvement
2. Consistently Meets Expectations
3. Exceeds Expectations
4. Strongly Exceeds Expectations, and
5. Superb

2. Google however has done away with in-between decimal slabs – such as 3.1, 3.7, 3.8, 4.1, etc.

3. The appraisal is now on a half-yearly basis, instead of the (earlier) quarterly basis. This has helped Google to save many man-hours, in view of their exhaustive appraisal process (see point 4 below).

4. More importantly, the appraisal, while *starting* from the line manager's feedback, becomes final only after 'calibration'. Group of managers sit together and review their employees' draft ratings, to remove bias, etc. (The author, Laszlo Bock, spends considerable efforts explaining the process and benefits of calibration.)

Now to the point of this section:

1. Chances are your company's employee practises are different than Google's. Or your specific line manager doesn't inspire confidence in the way he has appraised you.
2. Secondly, even in a company like Google – as Bock informs – despite their best efforts at transparency, some employees had misgivings about the appraisal process. Typical misgivings were:
 - A got promoted whereas B did not, possibly because A works for a C-suite executive. So it is better to work on a project headed by a senior person.
 - I see engineers in the Android (mobile device) team getting promoted whereas those in Infrastructure (data center) weren't. So it is better to work on user-facing stuff.
 - My chances of promotion are more if I work at the headquarters, instead of a regional office.
3. Lastly, in any company – other than Sales (with its month-on-month targets), all other jobs – Operations, Service, IT – have a high degree of subjectivity. You see your glass half-full; your boss sees it half-empty.

In view of the above, what should you do as an Individual to reduce your chances of a less-than-fair appraisal?

What *more* can you do – apart from good work – to ensure you are appraised fairly, commensurate with the work you have done?

After much thought, I think the suggestion in this chapter – sending an Achievement email to your boss, month on month – is the closest thing that comes to ensuring you do not lose out to the myriad of issues that shadow a typical appraisal process.

It ensures when you meet your manager for year-end appraisal, you will have something concrete to refer to for your performance.

It ensures when your manager sits down to evaluate the team, you and your achievements will be on top of his recall.

About the Author



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He is a graduate of K.C. College, Mumbai University.

Anil worked primarily with ABN AMRO Bank, a Netherlands-based bank, across its Indian branches and BPO, in his career (1994 - 2011).

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At work, each day brings with it a fresh set of challenges.

We put in long and hard hours to address them and to master them.

But are these one-of-a-kind situations really different?

A detached look will reveal - while the specifics of a situation will change from one to the next, at their core they all raise the same set of demands on us.

- How to escalate an Issue?
- What to do when 'A' says 'B' will do, 'B' says 'A' should do?
- How to deal with a Senior who doesn't respond?
- How to reduce Errors at work?
- How to reduce Meetings and Conference Calls?
- How to manage a Big team?
- How to get a 5 in Appraisal?

How do you respond to these innate challenges?

Could there be another, better way of handling these situations?

For the first time comes a book that attempts to address these and many such on-the-ground situations faced by managers and officers.

ANIL KARAMCHANDANI, an experienced manager, uses his 15+ years of experience, to show — some with anecdotes, some with examples — how to master these situations.

The book has 28 chapters, none of which should take you more than 10 minutes to read and implement. As an aside, they will ease the pressure off any boss, while helping to sharpen the execution skills within a team.

www.anilkaramchandani.com

