

EMPLOYEE ENGAGEMENT SOLUTIONS

BUILDING & REPAIRING TEAMS WITH
LEADERSHIP & A POSITION DESCRIPTION.

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STEP
by STEP
GUIDE

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HOW CAN I GET MY EMPLOYEES MORE ENGAGED?

HOW CAN I PREVENT PASSING OF THE BUCK ON GOALS AND ACTION PLANS?

SUMMARY

REMOVE THE “IT’S NOT MY JOB” EXCUSE

A Position Description is much more than a typical job description. It is a tool that helps you to fully define a job and put emphasis on what the company wants – results. These are clearly defined in the Expected Results section.

This Best Practice will assist and support your efforts to manage your human resource assets in many ways; the biggest one is establishing accountability. Leading-edge managers who have adopted this tool consistently tell me that they see an immediate drop in performance issues and a rise in effectiveness.

Best of all, by employing the Position Description for every position in the organization, you will never again hear an employee who has dropped the ball use this excuse: “I didn’t know that I was supposed to do that. It wasn’t stated in my job description.”



ELEMENTS OF THE POSITION DESCRIPTION

- ☑ Qualifications for the job.
- ☑ Specific function responsibilities (instead of duties or tasks).
- ☑ Expected results from the employee.
- ☑ Impact of the job on the organization.
- ☑ Authority levels for the position.
- ☑ Specific difficulties the person may have.
- ☑ Interpersonal relationships.
- ☑ Any other key items necessary for success.

While having a job description is something every manager and member of their team should have, the Position Description will enable the High Road™ leader to have and retain great employees. This assurance comes from defining each role within the company using the above elements. The emphasis on a typical job description is on the duties, while the focal point of the Position Description is on the Expected Results. By emphasizing these, you eliminate the need to cram every conceivable task (including cleaning the kitchen sink) into the specific duties.

This approach truly pays off when you use this tool on the marginally successful employee who hides under their reasoning: “But that task is not in my job description!” By defining what you expect of them, you eliminate this popular excuse and self-limiting belief.

I will explain each element of the PD.

STEP-BY-STEP TO DEFINE POSITION DESCRIPTION

STEP ONE: *DEFINE* EXPECTED RESULTS

You define and obtain your employee's agreement on what these are before he or she gets deep into the job.

☆ This is the core of what makes a PD differ from a normal JD, and instills immediate accountability.

STEP TWO: *DEFINE* IMPACT ON THE ORGANIZATION

This is a binding agreement between the employee and employer on the specific resources he or she need so that they can have the impact desired and achieve the expected results.

☆ This clarification helps in an employee's leadership role.

STEP THREE: *DEFINE* AUTHORITY LEVELS

With this clarification, the employee understands what decisions he/she can and cannot make and in turn asks for those that will support them in getting the expected results.

☆ This definition helps each employee to know what is vitally important.

STEP-BY-STEP CONTINUED...

STEP FOUR: *DEFINE* SPECIAL DIFFICULTIES

This is a binding agreement between employee and employer that spells out those things which will limit the person's ability to get quick or lasting results, like needing to upgrade the technical skills of their existing staff or having to invest in new technology. The things identified here are usually those limitations that could prevent them from getting the expected results.

☆ This section helps the supervisor and employer to be mutually accountable to each other.

STEP FIVE: *DEFINE* INTERPERSONAL RELATIONSHIPS

This is a binding agreement between employee and employer on the people that the employee has responsibility to and for, with whom they regularly communicate, and where they fit into the organization's structure.

☆ This helps everyone keep their eyes on the big picture and see the forest.



BENEFITS OF USING A POSITION DESCRIPTION

WHY SHOULD YOU HAVE A POSITION DESCRIPTION FOR YOURSELF AND EACH MEMBER OF YOUR TEAM?

The payoffs are numerous and here are some specific ones:

- ☑ Communicates clear expectations to everyone.
- ☑ Clarifies goals in advance.
- ☑ Reduces overlaps and gaps among the many team members' duties and responsibilities.
- ☑ Reduces uncertainty about what is expected of and from the employee.
- ☑ Documents performance because it is the basis for evaluations.
- ☑ Shortens the learning curve for new employees.
- ☑ Gives a clear definition of the job requirements to any applicant.

TIPS ON MAKING THE POSITION DESCRIPTION EFFECTIVE

RESULTS-ORIENTED

Make the emphasis of everyone's PD on the results you expect from them. To ensure that the PD remains current, update every employee's PD at least semiannually or every time you conduct a performance evaluation, whichever comes sooner.

PROACTIVE

Be sure that you state the expected results in a proactive manner. This encourages your employee to take initiative and become more of a self-starter. This evolves your role to being more of an encouraging coach and less of a supervisor.

FLEXIBLE

By focusing the employee's attention on the expected results instead of their duties, you automatically instill greater flexibility in the employee. If you want to develop employees who remain proactive and seek out areas of adding value, then make each employee's PD flexible.

BROAD

Today, the ideal employees are those who see the big picture, so it is important that you make the PD broad enough to cover more than just what the employee is doing currently. By developing their PD with a wide variety of expectations, you instill in the employee the need to see both the forest and the trees in their job.

BRIEF

The ideal PD is only one and a half pages long. As much as possible, you want to create a PD that is no more than two pages. If you can get the PD on one page, you make it even more effective and memorable; its length will depend on how many duties you include. Remember, the more you detail the expected results, the less you need to spell out in the specific tasks.

THE POSITION DESCRIPTION'S FORMAT

Employee Name: _____ Salary Grade: _____

Position: _____ Location: _____

QUALIFICATIONS:

Education, experience, specialized knowledge of skills. Personal qualities are not considered legitimate qualifications.

"4-year accounting degree with 2-4 years of experience at supervisor level. Certified Public Accountant. One-year experience in percentage-of-completion cost accounting."

"Two years' experience in a service organization. Experienced in working in a membership organization. Three years' experience in administrating the details of a small business. Self-directed and motivated individual."

EXPECTED RESULTS:

Measurable standards of performance such as cost reduction, receivable collection results.

"Implement computerization of General Ledger before (date)."

"Learn the full scope of the job within 60 days. Master the company's information and data system within 90 days. Improve the member billing and payment system, so as to improve cash flows by 25%."

IMPACT:

Amount of company assets accountable for: people, money, equipment, income, sales.

"Department of 10 professionals."

"Enhance the company's reputation by warmly welcoming guests. Enhance members' experience by being responsive and remembering their names. Enhance credibility through timely responses to all e-mails and phone calls. Enable the director to focus more on the members and less on administration."

AUTHORITY:

Limitations (if any) on decisions made, approvals given, contract signing, hiring and firing.

"Accounts payable invoice approval up to \$5,000. Travel expense voucher approval up to \$1,000."

"Approve acceptance of new members. Provide refunds up to \$200. Reschedule classes due to bad weather or other challenges. Make that bank transfers up to \$500."

PRINCIPAL DUTIES:

Major functional responsibilities.

"Establish and monitor budgets for all division departments."

"Monitor office operations during core hours."

"Manage the website in all aspects."

"Maintain complete records of member complaints and injuries."

"Keep facilities clean, organized, and adequately stocked."

SPECIAL DIFFICULTIES:

Problems or obstacles the incumbent must overcome in achieving goals.

"Most action items are subject to strict deadline pressure."

"Working alone most of the day and using the time wisely. Dealing compassionately with upset members. Taking leadership role when Director is unavailable."

INTERPERSONAL RELATIONSHIPS:

Insiders and outsiders with whom the person deals closely such as auditors, government agencies, press, customers.

"Principal point of contact with external auditors, department of transportation auditors and IRS."

"Primary point of contact with guests, prospective members, existing members, and contract employees."

POSITION DESCRIPTION

EXAMPLE #1

GENERAL ACCOUNTING ASSISTANT

QUALIFICATIONS

The professional filling this position will have a minimum of two years' entry level accounting experience or college education. They will have the interpersonal skills and problem solving experience expected of a professional. Their technical knowledge will include, at a minimum, usage of PC based computer systems and related applications, knowledge and usage of Microsoft Excel®, email, web searches, and database entry.

EXPECTED RESULTS

Within 9 months of being on the job, the employee will have accomplished these goals:

- * Measurable improvements in accounts receivable collections reducing DSO from the current 60 days to 35 days.
- * After completing cross-training, have a good understanding on the duties and functions of accounts payable, accounts receivable, and payroll processing.
- * Able to take over maintenance of general ledger and related financial reports within 6 months.
- * Reduce the use of paper by digitizing 80% of accounting documents currently used.

PRINCIPLE FUNCTIONAL DUTIES

- * Collection of accounts receivable, including follow-up and documentation.
- * Inventory reconciliations.
- * Reconciliation of bank accounts.
- * Analysis of general ledger accounts and preparation of electronic work papers.
- * Cross-training and understanding of duties in the following areas:
 - * Accounts payable processing and transactions (i.e., coding, processing payments, etc.).
 - * Cash receipts processing and transactions (i.e., coding, posting, reconciliation, etc.).

- * Sales processing and transactions (i.e., invoicing, summarizing, posting, etc.).
- * Payroll processing and transactions (i.e., data entry, tax filings & deposits, etc.).
- * Other accounting related duties and special projects as assigned and delegated.

SPECIAL DIFFICULTIES

- * Learning a complex accounting system quickly.
- * Working with a nonstandard accounting software.

INTERPERSONAL RELATIONSHIPS

- * Direct supervisor will be the Controller.
- * Task supervisors will be Accountant and the Accounting Assistant whenever cross-training and working within that person's area of responsibility.
- * Person will also have daily contact with customers, bank employees, and company employees.
- * Participating member of the finance team.

EVALUATION AND FEEDBACK

Quarterly performance evaluations will be made on the goals defined in the Expected Results and on the employee's learning curve, using the Learning Curve Evaluation Form, in the following areas:

- * Technical skills (growth)
- * People relationship skills (consistency)
- * Problem solving skills (growth)
- * Work habits
- * Communication skills (consistency)
- * Comprehension of training
- * Attitude/Enthusiasm
- * Professionalism (consistency)
- * Cooperation with and support of peers
- * Feedback from peers (360 evaluations)

POSITION DESCRIPTION

EXAMPLE #2

GENERAL MANAGER IN TRAINING

QUALIFICATIONS:

7 years of management experience; strong interpersonal skills; strong leadership skills; track record of initiating positive improvements; deep understanding of the maintenance industry; trained in continuous improvement; supervised team of 20 to 30 people; developed and managed company's financial plan.

EXPECTED RESULTS:

- * Able to take over the general management of organization within 6 months;
- * Improve the morale of the entire company; assess the quality of the team and replace weak performers;
- * Raise employee productivity by 25% within 9 months;
- * Create a win-win relationship with union;
- * Reduce employee turnover to under 3%;
- * Oversee implementation of new management information system and data base by December 31, 20xx.

PRINCIPLE FUNCTIONAL DUTIES:

- * Manage the operational side of the business.
- * Support the sales program and work performance by sales team.
- * Develop and manage annual budget and cash flows.
- * Supervise and direct finance, human resources, and production teams.
- * Work with production managers so night shift and day shift groups operate smoothly.
- * Strengthen the leadership abilities of direct reports.
- * Look out for the interests of the company's owners and serve as their information conduit.
- * Work with the leadership team to produce consist sustainable growth and profitability.

* Other management related duties and special improvement projects as required.

SPECIAL DIFFICULTIES:

- * The company's reputation for quality has declined significantly.
- * The professionalism and leadership acumen of the many senior and mid-level leaders is lacking in certain areas.
- * Employee morale is low – causing a win-lose approach by union members.

Interpersonal Relationships:

- * Report Directly to the Chairman of the Board.
- * A key member of the senior management, consisting of: Director of Sales, Director of Production; Controller; Director of Human Resources.
- * Direct reports are: Director of Production, Controller, Director of Human Resources, all administrative personnel.

EVALUATIONS:

Evaluation of your performance will be made on the following criterion:

- * Leadership skills
- * People relationship skills
- * Change agency skills
- * Company profitability (in coordination with Director of Sales)
- * Level of cooperation and coordination with Director of Sales
- * Employee productivity
- * Quality of service metrics
- * Employee morale metrics
- * Feedback from direct reports (360 evaluations)

POSITION DESCRIPTION

EXAMPLE #3

OFFICE PROFESSIONAL AND MEMBER SERVICE REPRESENTATIVE

QUALIFICATIONS:

The person filling this key position will have or be two years' experience in a service organization. Experienced in working for a membership organization. Three years' experience in administrating the details of a small business. Self-directed and highly motivated individual.

EXPECTED RESULTS:

The person filling this key position is required and held accountable to -

- * Learn the full scope of the job within 60 days.
- * Master the company's information and data system within 90 days.
- * Improve the member billing and payment system, which will result in an improvement of cash flows by 25%.

IMPACT:

In this highly visible role, the employee will serve us well by confidently -

- * Enhancing the company's reputation by warmly welcoming guests.
- * Enhancing members' experience by being responsive and remembering their names.
- * Enhancing credibility through timely responses to all e-mails and phone calls.
- * Enabling the director to focus more on the members and less on administration.

AUTHORITY:

The employee is granted equal responsibility and authority and be able to -

- * Approve acceptance of new members.
- * Provide refunds up to \$200.

- * Reschedule classes due to bad weather or other challenges.
- * Make that bank transfers up to \$500."

PRINCIPLE DUTIES:

The global responsibilities of the person in this role are -

[intentionally omitted]

SPECIAL DIFFICULTIES:

To do their job well, the employee is expected to professionally address these issues regularly --

- * Working alone most of the day and using the time wisely.
- * Dealing compassionately with upset members.
- * Taking leadership role when Director is unavailable.

Interpersonal Relationships:

- * The employee's supervisor will be the Director.
- * The employee will be peer with the firm's employees and contractors.
- * The employee's is the primary point of contact with guests, prospective members, existing members, and our contract employees.

EVALUATION OR FEEDBACK ON PERFORMANCE:

Regularly scheduled Performance Evaluations will be made on the following criteria -

- * Administrative skills.
- * Attention to detail with accuracy.
- * Responsiveness and timeliness.
- * Problem solving skills.
- * Professional work habits.
- * Communication skills.
- * Comprehension of training;
- * Attitude.
- * Enthusiasm.
- * Completion or fulfillment of Expected Results

POSITION DESCRIPTION

EXAMPLE #4

PART-TIME CONTROLLER

QUALIFICATIONS:

The person filling this role will have 5 years' experience at the Controller level in a production specialty-company environment. The person will have supervised at least five employees, from the recruiting phase through termination. The incumbent will have achieved certification as a CPA or CMA.

EXPECTED RESULTS:

Within the next 12 months, the person is expected to

- * Increase cash flows by 10% within one year.
- * Decrease DSO of accounts receivable by 7 days.
- * Speed up the delivery of financial and management reports by 4 days.
- * Reduce accounting staff turnover and stay within the company-wide target of 10%.

IMPACT OF JOB ON THE ORGANIZATION:

As a result of this person's role, Raelco will have competent financial leadership. The company's system of internal controls will be monitored and reported on annually. The person is expected to provide a positive management model for peers and a leadership model for finance employees.

AUTHORITY OF PERSON TO ACT FOR THE COMPANY:

The Controller is authorized to sign checks without second signatory up to \$5,000 and with second signatory up to \$50,000. The person can make and approve purchases on non-inventory items up to \$30,000. In cases of drawing against the line of credit, the person can borrow up to \$100,000 without the CEO's approval. The Controller can obligate Raelco to administrative type contracts of no longer than two years or a combined value of \$6,000.

SPECIAL DIFFICULTIES OF THE POSITION:

Since this position is part-time (30 hours maximum), the Controller is expected to fully train staff and then delegate responsibilities and authority necessary to achieve goals and have the impact expected.

The Controller will need to fully understand the information systems, software and hardware, since this person is responsible for the system's readiness.

The Controller will be required to have a good understanding of the job and the organization within six weeks.

PRINCIPLE DUTIES:

The global responsibilities of the person in this role are -

[intentionally omitted]

INTERPERSONAL RELATIONS:

The Controller supervises all the finance employees, which include the following positions:

- * Accounts payable specialist
- * General ledger accountant
- * Accounts receivable specialist
- * Accounting clerks
- * Inventory specialist
- * Financial reporting specialist

The Controller is a member of Raelco's senior management team, which consists of the following positions:

- * CEO
- * VP of Sales and Marketing
- * VP of Services
- * Director of Human Resources
- * Director of Production

The Controller will be the main or backup contact with these interested parties:

- * Vendors
- * Customers
- * Banker/Loan Officer
- * Legal Firm Partner
- * CPA Firm Partner
- * Leasing Company Representative

ABOUT RON RAEL

Ron Rael, a CPA, began practicing High Road leadership in 1994 and has created an impressive track record of accomplishments during his 35 years in the dynamic world of business. The organizations that engage Ron benefit from his:

- ✔ Sage decision making that boosts profitability
- ✔ Practices and examples that promote cooperation and interdependence
- ✔ Culture transformation coursework that develops engaged and committed employees
- ✔ Streamlined and lean process engineering

Ron is a leadership consultant, professional facilitator and coach to experienced leadership teams and emerging leaders. Training professionals since 1988, Ron's extensive wisdom and practical solutions, contained in his thirteen books, provide both strategies and tactics for organizational success. Ron has trained and coached thousands of leaders and business professionals throughout the United States and Canada. He is well-known for his original, enjoyable approach to learning. He develops caring, courageous, and compelling leaders worldwide.

Ron is the CEO of the High Road® Institute, an organization where people see the benefit of optimizing human potential in the workplace, its leadership, and its culture. "We encourage leaders to take the path less traveled, which requires tremendous professionalism, courage, and dedication." Through HRI services and products, clients experience:

- ✔ Higher levels of accountability
- ✔ Actualized commitments to ethical practices
- ✔ Enhanced governance and transparency
- ✔ Employees throughout the organization who are dedicated to service

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Thank you!