



CARICHAM
Centre of Excellence



OPERATIONAL EXCELLENCE

Managerial Duties Checklist



CHECKLIST



■ PLAN

- What are the goals?
- What is the strategy to achieve the goals?
- What actions (workplans) need to be taken?
- What resources (human, financial etc.) are needed?
- What is plan B?

■ ORGANIZE

- What structure is needed for staff to work together?
- Does the staffing meet the customer needs?
- Have people/personalities been taken into consideration?
- Have resources been allocated adequately?



CHECKLIST



STAFF

- What are the staffing needs?
- Review the job descriptions and capability requirements?
- Do the staff meet the capability requirements?
- Are new staff needed or is training and development needed?
- Recruit, select, train as needed from inside and outside company.

LEAD







- Do employees share/understand/support the vision?
- Are employees inspired and motivated?
- Have you communicated reasonable expectations clearly?
- Are you using your influence and persuasion skills positively?
- "Great job" goes a long way. Remember non-financial rewards.



CHECKLIST



CONTROL

-  Evaluate staff performance.
-  Develop, implement and review standard operating procedures.
-  Delegate tasks, supervise and give feedback on work in progress.
-  Document and review performance with staff (not only annually).
-  Determine any discipline (not punishment) or changes needed.
-  Document. Document. Document...