

Cultural Enterprises Podcast

Series 3, Episode 5 – Process Driven Thinking

As cultural organisations start to reopen, and plan for the return to some new version of reality, I'm struck by the opportunity this gives us to step back, reflect on some of our working practices, and consider making some changes. Today I want to take a look at a few tools that can help us as Visitor Experience or Operations Managers to improve our team's efficiency, improve the quality of our venue's visitor experience, and ultimately make our working lives a bit easier.

Everyone has very different ways of working, and I'm personally probably not the most organised and structured when it comes to tackling regular tasks. I'm good working towards a deadline, quite good under pressure, but can get easily distracted by shiny projects or responding to sudden unexpected challenges. What that sometimes means for me is that I can lose sight of the routine operational tasks that are absolutely critical for my wider team's success. I firmly believe that the best way of ensuring that the core elements of your department can run, to free you up to focus on strategic thinking or other projects, is to implement clear written processes and basic reports. It can take a lot of effort and time initially, but if you can involve your team and get their buy-in, you can develop a really efficient operation, and stay close enough to it to be able to deal with issues, but far enough away to keep developing yourself and making wider improvements.

The three things I want to think about today are written processes, sometimes called SOPs or Standard Operating Procedures – secondly site inspections, and lastly appraisals and performance management tools. Three areas where I think a real difference can be made with a bit of time investment. To make a sweeping statement, they're areas where cultural organisations aren't always the strongest. I spent the first six or seven years of my career working in corporate office and facilities management, where you can't send an email without a process behind it – but will never forget making that move to the arts sector and finding that tools I'd totally relied on previously, just didn't exist. Not that the work wasn't great, often better, in quality – certainly not that the teams didn't care or work incredibly hard – but things took longer and were less demonstrable to colleagues or managers because we weren't working within any kind of formal framework.

Let's dive straight into SOPs, or Standard Operating Procedures. What are they, and why should you care? Well, the basic principle, at least for the purposes of this podcast, is that an SOP is a detailed how-to guide to complete a particular task or set of tasks that your department manages. A good SOP is written very simply, in easy language, so that any member of your team, or actually ideally anyone who you might work with, can understand it. It should guide the reader step-by-step through a workflow process – whether that's booking a courier, dealing with a customer complaint, preparing a food or drink order, or re-stocking a shop.

When I was very early in my career, I wasn't good at relinquishing control at work, I was a terrible delegator – I quite arrogantly would say to my boss that I was the only one who could complete a particular task – which was obviously nonsense, but I wanted things done in a particular way. I would hate coming back from annual leave and finding things done in a different way while I'd been off and would get frustrated with colleagues for not automatically thinking in the same way as me. I remember a frank conversation with my manager, when he first asked me to develop SOPs for the tasks in my team's roles – he told

me that if I wanted things done in this particular way, then I had to create a guide for others to follow. And, crucially, he told me with some sarcasm that if indeed I was the best and only possible person to do all these things, that I'd never be able to progress and that the business would fall over if I was to leave. It was a really useful lesson to learn, and one that I tell my team now - as a manager, I need to be able to cope if someone is suddenly off sick or something unpredictable happens. It's their responsibility to enable me to do that, and I think having an SOP in place is the best way of doing it, so therefore they shouldn't be annoyed by the concept of doing what could be quite a large piece of admin.

So, this is why you should care. Firstly, if you want a task done in a particular way, this provides a framework for that which can be used operationally or in training for the long-term without you having to a) remember it, or b) constantly revisit it.

Secondly, it's really useful for us as managers to be able to take a step back from processes that our team carry out on our behalf, and identify where gaps are or where it could be more efficient. More junior members of our teams may not ever share where massive inefficiencies are, they might just be quietly frustrated but get on with it, or they might not have the skill to identify them when they're close to the tasks every day - we could be wasting our team's time and energy in elements that we can quickly iron out, making the job more fulfilling and less time-consuming.

Lastly, it's a great development tool. I've talked about how it can work for you as a manager, but actually if you can involve your team in documenting these processes, they're going to feel engaged and heard - and like they're adding permanent value to the team, for colleagues and for future staff in their role, and hey it's an opportunity to demonstrate their talents to you in quite a structured way.

I could talk about SOPs for hours but am conscious of time - the last thing I'll say is that they don't need to be posh, they don't need to look beautiful, and there isn't a right or wrong way of doing them - no matter what you might read online. You can do a flowchart, you can hand-write them, you can do it as bullet points - or you can standardise and do them quite formally and have a central template to work from. In my opinion, none of that really matters. It's about creating a document that works for your business, and for your team. And I would really recommend getting the team on the ground to do the first draft for you - then review them with a glass of wine and a large step back - does this workflow make sense, what seems sluggish, what can be tweaked.

Anyway, moving on before I get too excited - and it's a similar topic in a way - I want to think now about site inspections. This is particularly relevant for visitor experience managers, but actually for anyone operational it's still a useful thought process.

I'm sure lots of you already have opening checklists, tasks to complete before locking up, or just routinely walk a particular route each day to check everything's in order before you open the doors to visitors.

However, this is an area that can get really quite stale over time. Routine can be quite dangerous when we're talking about maintaining standards and keeping the customer journey fresh. In a recent role for me, I found that my team were (mostly) diligently walking the spaces to do our morning checks each day, but they weren't necessarily looking at the same things each time, they weren't clear whether issues they were finding had

already been logged, and getting back to the desk and typing up what they'd found was tedious and time-consuming.

Not to say this is the right solution for everyone, but I found some software that made life way easier. If you search for "smart inspection form software" online you can see examples of the sort of tools available. For not much money at all, we were able to design a form online which integrated to a free smartphone app, which asked specific yes/no questions and had space to add photos as you went. So now, the team walk into a certain space – let's call it Gallery 1 – and this form tells them what they should be checking in Gallery 1. Are the lights working, is the bin empty, is a particular display correctly set up, is it clean? For each item they simply have to tap that it's fine or tap that it's not, take a photo if necessary of the thing that needs fixing, and at the end of the full walk it generates a report which can be shared with the relevant teams. Now, this might sound like overkill for you – but for us we found that it saved at least 40 minutes a day, and more crucially, and this is where I sound really geeky, it gives you data. Now, I love a good bit of data, but this is particularly tasty.

This can show me whether there's a recurring issue, let's say after an event the same area is always left in the wrong configuration, or there's one light that flickers every few days and then stops. If you have data from these inspections, you can sort underlying issues and suddenly you're driving real improvements to your customer journey and your visitor experience which you might otherwise have never identified.

For some of you, software and apps might not be the answer, but there's no reason that you can't do a paper-version of this, and just tweak the detail that you're asking for and start manually recording trends.

My last thought on site inspections is that I know from experience, I don't personally give them as much time as I should as a manager. I would really encourage us all, myself included, to get a monthly slot in our diaries for us to do a proper walkaround, as if we were a customer. Loads of you probably do this already, but I'm sure I'm not alone in not always having the time. Note down the things you notice, good or bad, clear or confusing. Go to areas that you wouldn't normally, a different toilet or cloakroom maybe. Look at signage, focus on the detail that our customers see when they visit. I guarantee we'll all spot things, and our team will be reassured and pleased to see us taking notice.

You'll notice through this podcast that I'm talking a lot about engaging with team members, which leads us straight onto our last section on performance management. In our sector, employee management is tough. It's very different to the corporate world. There are usually no financial bonuses tied to performance management processes, our team are sometimes volunteers, not full-time, or might not do this as their only job. There's also the thing that we don't talk about enough. Staff retention in arts and culture is generally really good, and that's a brilliant thing, but it also gives us challenges. We tend to work for organisations that we personally believe in, and some staff don't regularly change jobs. There are people I've worked with who have given over 40yrs service to an organisation, and any kind of performance management with them is going to naturally be a challenge. Often their experience is vital and they're a part of the lifeblood of our organisations, but they tend to need a different style of management to what I'd have employed in my previous corporate career. To be able to take these team members on a journey with us, to be able to implement any changes, we have to get their buy-in. We have to set the tone of our team's culture, and get them on-board with it.

I think it's fair to say that there aren't always the most developed HR processes at our organisations, and performance reviews are sometimes viewed as pointless paper exercises. It was probably the thing I was most surprised by when moving over from the corporate sector. In previous roles, performance reviews or appraisals were absolutely massive – so significant. Staff would work on taking notes through the year of things that they wanted to mention in them, managers would refer to previously set objectives in 1-1s with team members to track progress against them. Of course, the key difference is that at many corporate jobs, the score of a performance review either positions you for promotion opportunities, or directly leads to bonuses and salary increases. The stakes are higher perhaps, but I like to think that it's not just the personal financial aspect that makes them significant – I think it's the culture. It's how they're talked about. The managers take them seriously, they talk about the importance of their appraisals and yours – there's the idea of delegating objectives down to team members to tie their success in to yours – it's formal, it's an important process, it matters. I think for us to get the best out of our teams in our sector, we have to start the change – we have to take appraisals seriously, ours and our teams, and we need to invest the time in them.

Taking a step back quickly, let's think about what an appraisal is, or perhaps more specifically what I think makes a good appraisal. There are lots of different styles, and finding the right balance between formal and informal, centralised or specific, is really difficult. I'm not sure I've got it right yet, but my thoughts are that to make them relevant, they need to happen once a year only. They need to involve some reflection from the employee first, to get them in the right headspace and to force them to prepare for the conversation. I would say that a blank form needs to go to them first for their comment. They should have a section to complete first, and their answers then form the basis of your meeting. *What are you most proud of at work this year, what have you found most difficult and challenging this year, what are you hoping to achieve next year, and then perhaps how do you think your performance has been on the whole.* Four questions for them to complete first, a deadline of around a week before the meeting to send them back to you. Then you can prepare for the conversation too, knowing what their starting point is. I've found that talking through the employee's answers is a great way to unpick how they're feeling, and in fact how you feel they're getting on.

It then works well for two or three moments of feedback from you as their manager – what's great, what needs work, what you want them to focus on next.

Appraisals work really well if you can then set objectives for the staff to complete over the next year. If they can come up organically during the meeting, that can be really positive, but it might be worth having an idea of some before you go in. I always try to have one of them be a bit of a longer term focus that hopefully stays relevant for the next year – perhaps to develop confidence or knowledge in a particular thing, or to have a particular skill refined for the next year. Any of you who've done management training courses before will know about SMART target setting. Whilst I don't hugely love that acronym (have a look online if you haven't heard of it), it's true that it's helpful to try to get the objectives to be as clear, measurable and realistic as possible.

Another way appraisals can be quite exciting is when they enable real developmental conversations with the team. Suddenly you'll hear about training that someone wants to complete, or realise someone's aspirations in terms of their career. Taking that time with the team can be so valuable for building your relationship with them, but in a more formal way than your day to day interactions with them are.

It's worth writing the meeting up and sharing the notes with them afterwards, again to reiterate the importance of the process, and then remember to keep referring to the objectives in any 1-1s you have in between appraisals. How's that going, is there anything you need? If you commit to exploring training in that appraisal meeting, absolutely make sure that you follow-up and deliver what you've promised. After a couple of years, with a bit of cajoling, I genuinely believe the team will be engaged, and you'll have made a fairly easy win at improving the culture of your department.

I realise that this has been quite a sprawling podcast, touching on lots of different areas, but I think I've been trying to reflect ultimately on process-driven thinking, the option we have to create simple documented processes to enable better efficiency, better communication, an easier and more structured work-life for us as managers, and a more clear vision to our teams. I definitely don't have all the answers, and feel for everyone after the year we've had, but really encourage you all to think about the areas of your role which you find most difficult – and see if any of the tools I've touched on today, or a different kind of process-driven approach, could just take the edge off now we're starting to go back to normality – so you can focus more on the bits of the role you love. For me, that's people, it's creativity, and it's enabling the best quality experience for our visitors – to these organisations or venues that we so deeply care about.

Thanks so much for listening. Feel free to connect with me on LinkedIn if you have any questions or want to discuss anything further.

Take care, and speak soon.