BSBINN201
Contribute to workplace innovation
Release 1

Learner guide

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Aspire Version 1.1

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Contents

Before you begin

This learner guide is based on the unit of competency *BSBINN201 Contribute to workplace innovation*, Release 1. Your trainer or training organisation must give you information about this unit of competency as part of your training program. You can access the unit of competency and assessment requirements at: www.training.gov.au.

How to work through this learner guide

This learner guide contains a number of features that will assist you in your learning. Your trainer will advise which parts of the learner guide you need to read, and which practice tasks and learning checkpoints you need to complete. The features of this learner guide are detailed in the following table.

Feature of the learner guide	How you can use each feature
Learning content	Read each topic in this learner guide. If you come across content that is confusing, make a note and discuss it with your trainer. Your trainer is in the best position to offer assistance. It is very important that you take on some of the responsibility for the learning you will undertake.
Examples and case studies	Examples of completed documents that may be used in a workplace are included in this learner guide. You can use these examples as models to help you complete practice tasks and learning checkpoints. Case studies highlight learning points and provide realistic examples of workplace situations.
Practice tasks	Practice tasks give you the opportunity to put your skills and knowledge into action. Your trainer will tell you which practice tasks to complete.
Video clips	Where QR codes appear, learners can use smartphones and other devices to access video clips relating to the content. For information about how to download a QR reader app or accessing video on your device, please visit our website: www.aspirelr.com.au/help
Summary	Key learning points are provided at the end of each topic.
Learning checkpoints	There is a learning checkpoint at the end of each topic. Your trainer will tell you which learning checkpoints to complete. These checkpoints give you an opportunity to check your progress and apply the skills and knowledge you have learnt.

Foundation skills

As you complete learning using this guide, you will be developing the foundation skills relevant for this unit. Foundation skills are the language, literacy and numeracy (LLN) skills and the employability skills required for participation in modern workplaces and contemporary life.

The following table outlines specific foundation skills noted for your learning in this learner guide.

Foundation skill area	Foundation skill description
Reading	• Categorises, interprets and reviews information from a range of sources to generate ideas relevant to the workplace
Writing	• Communicates information using clear language and formats appropriate for the audience
Oral communication	• Actively participates in verbal exchanges of ideas and elicits the view and opinions of others by listening and questioning • Uses clear and relevant language to clarify workplace issues and promote ideas
Numeracy	• Performs basic mathematical calculations to estimate time and cost in relation to implementation of ideas
Navigate the world of work	• Understands responsibilities of own role
Interact with others	• Follows accepted communication practices and protocols when discussing or presenting ideas to others • Seeks and takes into account perspectives and opinions of others
Get the work done	• Plans and implements routine tasks making limited decisions and seeking assistance, when necessary • Uses analytical or lateral thinking processes to identify improvements or new ways of approaching tasks • Identifies and anticipates operational problems and develops possible solutions

What do you already know?

Use the following table to identify what you may already know. This may assist you to work out what to focus on in your learning.

Topic	Key outcome	Rate your confidence in each section
Topic 1: Identify opportunities to do things better	1A Be aware of your role in workplace innovation	❏ Confident ❏ Basic understanding ❏ Not confident
	1B Proactively identify opportunities for improvement in your area of work	❏ Confident ❏ Basic understanding ❏ Not confident
	1C Gather and review information	❏ Confident ❏ Basic understanding ❏ Not confident
Topic 2: Discuss and develop ideas with others	2A Identify people who may provide input into ideas for improvements	❏ Confident ❏ Basic understanding ❏ Not confident
	2B Select the best way of approaching people to begin sharing ideas	❏ Confident ❏ Basic understanding ❏ Not confident
	2C Seek feedback on improvement of ideas	❏ Confident ❏ Basic understanding ❏ Not confident
	2D Review and select ideas for follow-up	❏ Confident ❏ Basic understanding ❏ Not confident
Topic 3: Address the practicalities of change	3A Take action to implement routine changes	❏ Confident ❏ Basic understanding ❏ Not confident
	3B Identify and articulate issues and practical processes	❏ Confident ❏ Basic understanding ❏ Not confident
	3C Present ideas and practical suggestions about improvements	❏ Confident ❏ Basic understanding ❏ Not confident

Topic 1
Identify opportunities to do things better

Great organisations need people who seek ways to improve what is being done and who enjoy contributing to the innovation effort. In any role, you can help your workplace to become more effective and produce the best results possible. Be curious about work practices that are not as productive as they could be, rather than just accepting things because 'that's the way they are'.

You can identify opportunities to do things better. Be aware of your role and those of others around you. You need to be able to identify what exactly needs changing and obtain the right kind of information to help you put forward a case for change.

In this topic you will learn how to:

1A   Be aware of your role in workplace innovation

1B   Proactively identify opportunities for improvement in your area of work

1C   Gather and review information

1A | Be aware of your role in workplace innovation

The first step in innovation is to pay attention to what we do and the way we do it. This helps us to do our jobs well and to make them even better – for our own benefit and that of our organisation. The next step is to think creatively about our work, both individually and in teams. The final steps include engaging others, reviewing, planning and implementing the innovation.

Knowing the requirements of your work role does not just mean following orders. You may think of a better way to do something than how it is currently being done. You may discover something that is being done incorrectly or that does not meet a particular standard. It is important to share this information, and it is your responsibility to advise the right person or people so that changes can be made.

What is innovation?

Innovation can take many forms. It may involve creating new products, services or systems or building on existing ones. It may be about changing attitudes to our jobs, our organisation or our customers. It may also involve new approaches to the way we do our work, such as changing team structures or developing new work teams.

Examples of innovation

Here are some examples of innovation in the workplace.

Receptionist

Susan is a receptionist for a local council. Her job is to attend to customers at the counter and assist with incoming phone calls. She regularly has long queues of customers at the counter; some have quick inquiries, while others require more time. She and the switchboard staff discuss ways to create at least two queues at the counter, how customers can choose which queue suits their needs and how the staff can better share counter duties while still managing the phone calls. They present their ideas to their manager and include a way to pilot this innovation.

Paper factory

Spencer works in a paper factory and develops an adhesive. It is not strong enough for his purpose as it keeps papers together but is easily pulled apart. Colleagues use the adhesive to attach notes in work files as it does not damage anything. A few years later the company realises the value of this innovation and renames it the 'Post-it note'.

Why is innovation important?

Innovation is good for business. It helps organisations achieve commercial success by providing new and better products and services. These are often delivered at lower costs. Doing things differently can also help to create better, more productive workplaces and make staff feel more involved and happier at work. Clients also benefit from improved products and efficiencies and better prices.

Innovative organisations outperform others. They can respond faster and better to changing environments, grasp opportunities and develop necessary partnerships to generate and act on ideas. Innovations can benefit organisations in a number of ways, as shown on the following page.

Make the most of technology

Innovations in programs and equipment make it easier and faster to produce goods and to operate generally.

Compete globally

Innovations may reduce production costs and times and enable competitive access to the world market.

Maintain and grow the business

Innovations enable constant adaptation to changing and diverse customer demands.

Organisation

Work smarter, not harder

Innovations may improve time management and streamline systems and processes, producing greater output.

Make workplaces more pleasant and productive

Innovations help reduce absenteeism and staff turnover.

Give staff a sense of ownership in their working life

Innovations allow workers to build on their expertise and encourage workers to take pride in their work.

Your role in innovation

Everyone can contribute to making changes for the better – we all do things differently and can use our individuality to our advantage. You don't have to wait to be asked to be innovative at work, nor do you have to be at a particular level. Changing work practices to meet current needs is part of your work role and can be interesting. You also develop new skills, which benefits your organisation as a whole.

Many of the small changes you make may not be obvious, but everything adds to your sense of job satisfaction and to your organisation's effectiveness. Some innovative work practices may be someone else's idea, or you might work in a team where everyone does things a little differently.

A small change could be something as simple as providing up-to-date reading material about the organisation in a waiting room for visitors to read. Ideas for implementing your innovative ideas are shown below.

What to do with your innovative ideas
• Include others who need to know and who need to be involved.
• Be able to show how your idea will help your organisation.
• Follow any set procedures in your organisation for presenting new ideas.
• Accept that the final decision may not be yours.
• Implement changes only when you are sure you have the approval to do so.

Your role in innovation

Example: initiative in the workplace

Gina works for a large organisation that has 2,000 staff. Part of Gina's job is to sort and deliver the mail each morning. This usually takes an hour and a half, but in December, sorting takes her all morning and she gets behind with her other work. Other people rely on Gina to prepare an updated account list by lunchtime each day and are not happy when she falls behind.

Gina realises that this is not an efficient or effective way for her to work and that she needs to find a better way to do things. She does a bit of research using the internet, and discusses the problem with her work group to ensure she knows what everyone needs. She locates a new product that solves the problem and will help her sort the mail more efficiently. Gina also works out a new daily routine that will help her attend to all her tasks in a way that satisfies the needs of others.

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How organisations encourage innovation

More and more, organisations are seeing the benefit of encouraging staff to present innovative ideas. Some organisations actively encourage innovation through a range of methods including:

- suggestion boxes
- team meetings
- workshops
- planning days
- training and development
- staff surveys
- competitions
- innovation-based reward practices.

Example: two organisations encourage innovation

Small business

A small publishing firm with 15 staff creates newsletters for associations. They have had the same clients for a long time. Most of the staff know each other quite well, but do their own work without the need for much interaction with others. The two owners are worried that the energy seems to have gone out of the organisation. None of the staff have had new duties, training or development for some time. The owners decide to treat their staff to a Thank you dinner as a way of acknowledging their hard work and loyalty, and to use this time to offer prizes for innovative ideas for improvements. The owners ask two supervisors to hold weekly meetings at which members of their teams can brainstorm ideas.

Lev, the sales representative, wins an award for his suggestion that each month two staff members could research, produce and circulate a short brief with information about an association that may benefit from having a newsletter or other publication. Kassia, a data-entry clerk, receives an award for suggesting that staff subscribe to different newsletters to get new ideas and share them with the others in a monthly meeting.

Large organisation

ACB Importers is a large company with 1700 staff working in Sydney, Melbourne and Perth. The senior managers want to improve the way they do things and decide to ask staff to submit ideas using a staff suggestion box in each location. The boxes are opened each month at the monthly management meetings. Suggestions are investigated and the best ones are presented at a senior management meeting each quarter. The senior managers decide which ideas should be implemented. This month, Ben Hassan, the receptionist in Perth, is commended for his suggestion about ways to cut down the amount of paper that the company uses.

Who to involve in the process

Everyone is responsible for coming up with innovative ideas, but when your ideas are being presented and implemented, you need to take into account the work roles and responsibilities of others in your organisation.

Depending on the size and structure of your organisation and the type of change you want to make, there may be other people who need to be involved.

Other people to involve in a process of change:

- Your immediate supervisor or team leader
- Others in your work group
- Other teams and team leaders
- The quality assurance or productivity manager
- The owner or manager of the organisation
- Clients, sponsors and other interested parties

Practice task 1

Read the case study, then answer the questions that follow.

Case study

Samara has worked as an administration clerk for a manufacturing business for the past six months. She started as an inquiry officer in the accounts department, and is now one of a team of four clerks in the payroll area. On her first day in payroll, Samara notices that the records system is much older and more complicated than the one used in the accounts department. Samara immediately approaches her supervisor to highlight the differences between the two departments and to request that they purchase a new payroll package.

The supervisor listens to Samara, then tells her that there is no money to buy new software and that she will just have to cope with the system they have.

1. How has Samara gone about the task of suggesting changes? Was this effective? If not, why not?

... continued

2. How has Samara involved others in the process?

3. How likely do you think it will be for Samara to have her requests met?

4. What do you think Samara could have done differently to get a better result?

... continued

1B Proactively identify opportunities for improvement in your area of work

There are always opportunities for improvements. A person with good ideas could spend all day being innovative. But we still need to get our work done. It's about having a balance.

If there is no innovation, our jobs and our organisations become stale and boring. But too much time spent thinking about how to do things differently means that nothing will be achieved on a daily basis.

It's a good idea to see your role as having two parts: one where you focus on innovation, one where you get the job done. Have your working hat on when there's a deadline to meet; have your thinking hat on during quieter times.

Some people make notes about ideas. Others spend a few minutes each day thinking how they could do their job better.

How opportunities are identified

Always be attentive to problem areas as well as to ways to improve your role and workplace. There may be a need to do things more quickly, to make fewer mistakes or to make the work environment healthier and safer.

The process of larger changes can take some time. As we have already seen, some organisations actively encourage people to be innovative and provide ways for this to happen. Sometimes, though, while you are working you will come up with your own good ideas, and it is important to devote a part of your day or week to developing these. Below are a number of ways you can take note of potential opportunities in your workplace.

Be observant

Notice how you can improve the way you do things.

Be curious

Ask questions of colleagues and read procedure manuals and frequently asked questions documents (FAQs).

Be a creative thinker

Come up with a number of possible ways of making changes.

Be experimental

Test out your ideas by sharing them with others and practise new activities and methods in 'trial' situations.

Be receptive

Be open to new ways of doing things – incorporating feedback from others and being prepared to change your mind if something better comes along.

How being innovative differs from just doing your job

What will you be doing when you are wearing your 'thinking' hat? The process often starts by noticing that something is not working well.

Perhaps you are always waiting to use the photocopier at critical times. This means you are wasting time and your work is not getting done, possibly holding up other tasks.

While you are doing your work you may notice that you are duplicating a task, and this appears to be a time-wasting activity that serves no purpose.

Sometimes, there do not seem to be any problems. Things may seem to be working well, but you or someone else may think of a way to improve a task, process, product or service so it better meets current needs or keeps pace with modern work practices. It is important that you do not simply accept things as they are when there may be room for improvement.

Areas where improvements can take place

In the business world, innovative ideas generally come under one of nine categories, each of which are described below.

Processes and procedures

Improving processes and procedures involves developing more efficient and beneficial ways to carry out tasks and duties. It may involve changing the order you do things in, or reducing the number of steps it takes to achieve a particular result – anything that helps you make the best use of your time at work and ease workload pressure.

For example, you may have been instructed to process email requests for information about a service or product in the order you received them. You find that some requests are handled quickly and easily, while others take a long time and require a great deal of research. You come up with an idea to handle the easy ones straight away and leave the more difficult ones until later on in the day. This way you can respond to most inquiries quickly and efficiently, and in the afternoon you can deal with the others in a more leisurely manner.

Work practices

Work practices are the way your organisation does its business; that is, its policies and general methods of operation. This can include the way teams are made up and change over time. Sometimes teams need to change because they are not working as effectively as they could.

An example is a bank deciding that it wants to attract more customers. There are two other banks in the same suburb. At a staff meeting, a worker suggests changing the opening hours so that customers can access their bank earlier than the other banks.

Changes in the physical environment

The physical environment may need to be changed if people are not able to work to their best ability; for example, if the layout is inappropriate, something is unhealthy or unsafe, or something is not pleasant for staff or clients.

For example, an increase in staff in an office means that some workers are placed in an area not previously used by people; this area is not well ventilated and becomes very hot in the afternoons. New air-conditioning and vents could be installed and blinds placed in front of the windows to make this area safer and more comfortable for staff.

Storage or maintenance procedures

Organisations need to review and update their storage and maintenance procedures regularly and build in ways to deal with future growth. Staff need to know what needs to be stored and where, and how to dispose of anything not required. Maintenance schedules for a wide range of equipment need to be developed, costed and adhered to.

An example involves a spa and pool company with several large outlets. Each outlet has the current range of stock and some also have old stock at discounted prices. At a planning day, staff agree to move several of the outlets to smaller sites, have less stock on site and set up an online shop to sell old stock and where customers can select and design spas and pools based on their bathroom or garden measurements.

Team communication

Developing better ways to communicate with others can improve the way your team operates and increase client satisfaction.

Some examples of ways to improve communication include holding team meetings at less busy times or using teleconferencing where it is hard for people to travel. Better communication can also come from developing a weekly newsletter to keep staff and/or clients up to date. This is also cheaper, faster and less wasteful than printing off and posting paper-based information.

New technology

When websites, software, systems and equipment change, work practices need to be adjusted.

For example, an organisation posts monthly updates to its customers. A clerk suggests that instead of mailing the updates, they could add them to the organisation's website as bulletins. They could send one further letter to clients explaining the new system. Using technology will reduce the time taken on updating clients, so staff can focus on other things such as research and product development.

New customer base

Finding new ways to source and grow the customer base is vital in most organisations; for example, an organisation may develop new marketing strategies, research gaps in the market, produce adapted and new products, analyse competitor products and customer profiles, and change outlets and distribution processes.

For example, a new telephone company has a very small customer base. Staff and managers brainstorm ideas for growth. They decide to have a marketing campaign on youth-focused media (popular radio stations and specific internet sites). They introduce greater variety in product range and change some of the bundled plans. They also introduce some giveaways and a reward system for customers who introduce new customers or who are 'big spenders'.

Staff changes

Sometimes changes in the workplace mean that people with different skills are required.

For example, a data-entry clerk may be replaced by a machine that scans and inputs data directly. Large offices once had someone (often known as the 'tea lady') who pushed around a trolley at morning- and afternoon-tea times. With the advent of coffee machines, everyone can now get their own cup of tea or coffee whenever they like – the tea lady was replaced by a machine installer and supplier.

Job role changes

The way something is done changes over time, perhaps because of changes in client needs, new business priorities and/or because of improvements in technology.

Consider an inquiry officer in a large government department. When the role was first created, people wanting information came to the office. Over time, clients wanted to use the telephone rather than spend the time travelling, so the inquiry officer's role changed from managing the public area and speaking to people face to face to working in an office with a telephone. After a while, clients started to email their inquiries, which means the inquiry officer now uses a computer for most of the day. Through all of these changes the inquiry officer's expected outcomes have remained the same, but the way they work and the technology used has changed enormously.

Generate new ideas

There are many ways to get creativity flowing. Sometimes new ideas come quickly and easily; at other times you need to put in some effort. The following methods can help you to produce ideas about any issue, including ideas for improving things at work.

Brainstorming

Brainstorming means coming up with a range of ideas in a short time. You can brainstorm by yourself, but it is usually better to get together with at least one other person, or your whole team. You may suggest that your team has regular brainstorming sessions to discuss a particular area of work.

For example, if you are having trouble keeping up with your emails and getting your work done, it can be a good use of time to brainstorm ideas and a range of possible solutions to better manage tasks and time. It is important that during the brainstorming process you do not make any decisions about what is a 'good' or 'bad' idea. Write everything down, no matter how silly it may sound.

Mind mapping

Mind mapping was invented and patented by an American, Tony Buzan, who discovered that we can tap into more areas of our brain and come up with more ideas if we 'map' our thoughts on a page.

To draw a mind map, write a core word or phrase (such as a problem you are having) in a box in the centre of a page. Then draw a number of paths coming out of the centre box, and on each path write down different aspects of the problem. Create paths leading from each aspect suggesting ideas for solutions. You can then look at your mind map and decide which ideas would be good to follow up.

Creative thinking

Creative thinking involves creating or inventing something new or original, usually by combining, changing or reapplying existing ideas. It involves exploring ideas, generating possibilities, looking for many answers rather than just one, and lateral thinking. Edward de Bono, a leading authority on this topic, has written numerous books and developed many 'thinking tools'.

While developing ideas for improvement, it is important to come up with as many ideas as you can. This may mean using various methods and looking at the area for improvement from a number of different angles. There are several reasons for this:

Not all ideas may be practical on further investigation.

You may need a short-term solution while a longer-term solution is being actioned.

More than one idea may need to be implemented.

One solution may not work out, so having other ideas avoids going back to the beginning again.

Practice task 2

Read the case study, then answer the question that follows.

Case study

Part of Chen's new role is to contact clients with unpaid accounts and remind them to pay them. She is told by her supervisor to make her calls in between other tasks in the 'quiet' times. She never knows how many calls she will need to make each day.

Chen does not enjoy this task; it is frustrating because she rarely gets to speak to the clients. They are always too busy and, when she does speak to them, they tell her they can't pay until they have checked their records. Sometimes they ask her to call back at a particular time, but then she has to do the banking and organise the courier and forgets or does not have time. This means that each day Chen has more and more people on her list.

In addition, Chen works in a very noisy environment; her desk is very close to a large machine. This makes talking to clients even more difficult and Chen also worries about the effects of the machine on her hearing.

Over the following few weeks Chen comes up with some ideas about how this task might be carried out differently.

... continued

Which category, from those listed below, does each of Chen's ideas fit into?

- Processes and procedures
- Storage or maintenance procedures
- New customer base
- Work practices or services
- Team communication
- Staff changes
- Changes in the physical environment
- New technology
- Job role changes

Fill in this table.

Chen's ideas for improvement	Type of improvement
Contact the clients via email rather than phone	
Set some time aside early in the morning to make phone calls, before everyone's day gets busy	
Investigate whether someone else in her team who is not so busy can make the calls, or share the calls among team members	
Ask clients to pay up-front so there is no need to follow up late payments	
Organise a call schedule that is created each week in advance so she can better structure this task	
Purchase a new system that will automatically send reminders to clients, eliminating the need to make calls, which will free her up for other more important duties	
Move to a quieter place to make the calls	

1C Gather and review information

Once you have ideas, you need to investigate these further to decide which ones you will present for consideration.

A good approach is to start by considering the history of a situation before making any changes. Even if the reasoning made sense at one time, there may be valid reasons for making changes. This is why you need to make sure you understand as much as possible about the current situation, including the expectations of your role and its outcomes.

Below are some reasons to consider both the past and the future of a situation before deciding to make changes.

Consider the past

It is useful to understand the reasons behind the way something is done or why a particular situation exists. Sometimes this information may be easy to find, such as in the minutes from a meeting, a handbook or manual. If you can't find any written documentation, the instructions about how something currently operates might have been verbal. There may be someone you can ask – perhaps your direct supervisor. You may find that no-one really knows why something is done in a certain way; it is just the way it is.

Consider the future

It is important to also consider the future. You may have been told about a change that is going to happen, or you may have some clues that you can use in deciding which ideas will be more beneficial in the long term. For example, staff in your area may be sent on a training course to learn a new software package – this will mean some sort of change is about to happen. This may be useful information that can help you make better choices.

Understand the situation

Understanding your own work role, those of others in your team and the organisation's priorities are all important things to consider as you gather information relevant to your ideas for change. The main reason why you are employed is to help your organisation achieve its goals and expected outcomes. Each staff member contributes to these goals in a particular way. There is no point changing the way you do something if it stops you achieving these goals.

Whenever you do something, it will have some kind of effect on the way others work. For example, moving your in-tray under your desk might make it easier for you to access, but it will make it more difficult for others to use.

You need to make sure you understand:

- the organisation's expected outcomes and how well you can achieve these outcomes under current conditions
- whether the current processes and situations are adequate for needs in the foreseeable future
- the resources required for your ideas and whether these can be supplied
- any barriers that may hinder your idea being taken up
- what impact your ideas might have on others: clients, staff or the general public.

How practical innovative ideas are

Try to imagine the needs of your role in the future – there may be no point implementing change that is only going to be useful for a short time.

Think about how your ideas will be resourced if they are adopted by the organisation. Resources can be things you can see or touch, such as computers, phones, telephone directories or software packages. They may also be less obvious, but equally important, things like time and your skills and knowledge.

It is important to ensure your idea is realistic before suggesting it to others. You need to consider things that might stop you from progressing, such as limits to finances, time or resources or the organisation's current policies or priorities.

Sources of information

Useful information can come from a wide range of sources. Researching these sources is essential if you want your ideas to be taken seriously. Sometimes there appears to be too much information. It is usually better to select one or two reliable and trusted sources than to gather large amounts of information that may be of little use. Information can be relatively easy to obtain, with some ideas shown below.

Sources of useful knowledge
• Clients or customers and other staff
• The internet
• An organisation's intranet: some organisations have their own internal internet that is just for staff
• An organisation's documents such as policy manuals, handbooks and procedures
• Industry sources such as journals, magazines, newsletters, e-bulletins and subscriber lists
• Suppliers' catalogues
• Sales representatives who visit your workplace
• Newspapers, radio and television news and current affairs

Make use of other innovations and ideas

You do not have to reinvent the wheel – someone else may have already addressed your problem or need. Take the time to find out whether similar approaches have been used in other departments of your organisation or other organisations. Sometimes these discoveries are made through a casual chat, or an organisation's newsletter may mention a new technique or process they have implemented.

Internet sites, publications, television or the radio can also help you with your research. You might read a story about someone who has developed a new and innovative technique, or a new strategy or product may be reviewed. Someone in your organisation may have recorded notes when an idea was brought up in a meeting or as part of a review process.

Time-saving considerations

In some instances, you may be able to take some preliminary actions that could save time and money before any attempt is made to explore your innovative idea. These include getting some feedback from others and/or exploring the potential cost of your proposal.

Getting further feedback from others can help you decide whether your idea would be useful and therefore likely to be accepted. You could do this by asking selected staff members to respond via email as to whether they think your idea might improve current practices. This way you also have a useful written record.

Obtaining brochures and quotes for services, new equipment and software can save a lot of time, especially if you are aware of any budgetary limitations. Getting a few quotes can help you compare and contrast these, or if there is a preferred supplier you can ask for the special customer rate.

Review information

After you have collected information about your idea, you need to review it for:

- currency – whether it is up to date
- relevance to the idea – whether the information directly supports the idea
- suitability in your situation – whether the information is likely to be viewed as useful and practical
- likelihood of fixing the problem or achieving positive change – whether it will be seen as worthwhile to invest time, money and/or other resources to make use of this information.

After the review

After you have reviewed your information, you need to prepare it for presentation in a useable format. One way to do this is to create a document that outlines the stages you have worked through in a logical manner. Carefully summarise what you have found out to help readers to be able to quickly understand the information, its source and its value. Use headings to help you set out your proposal, such as those below.

Suggested headings for a proposal document
• Reason/s for change – the problems or the improvements you want to make
• Possible solutions – the ideas you came up with
• Supporting information – the results of your fact-finding exercises
• Recommendations – the idea or ideas that have the best chance of success

Practice task 3

Read the scenario, then answer the questions that follow.

Scenario

You are out of the office for a few hours each day collecting supplies. You think it would be a good idea if your organisation provided you with a mobile phone. This would allow you to be more responsive to other staff and clients and save your organisation money. You also see benefits in changing the order process, so staff with requests can provide you with orders each morning before you leave.

1. What sources of information and what strategies would be useful to gather information to help you present your idea effectively and have it accepted? You may need to conduct some research.

2. Explain in one or two sentences why you selected these information sources and strategies.

Summary

1. Innovation starts with a need to do something better.

2. There are a number of different ways in which new ideas can be generated.

3. A range of people are involved in turning an idea into practice.

4. Further information is required to see which ideas are workable.

5. Information needs to be reviewed and checked before it is presented.

6. Materials need to be combined in a logical way prior to being presented.

Learning checkpoint 1
## Identify opportunities to do things better

This learning checkpoint allows you to review your skills and knowledge in identifying opportunities to do things better.

Part A

You are going to find out how innovation is currently being practised in some organisations by interviewing two or three people who currently work in a business environment in different organisations.

Develop four or five questions that you can ask to help them to identify and describe a change they have made and the way this happened. Your questions need to be designed to get information about an idea they came up with, how they obtained and reviewed information, who else was involved in the process and at which stages. Note: you may need to describe what innovation means, as people do not always recognise changes they make as being innovative.

Record your questions and five summary points from each person you interviewed. Then, write a paragraph describing how similar or different these findings were.
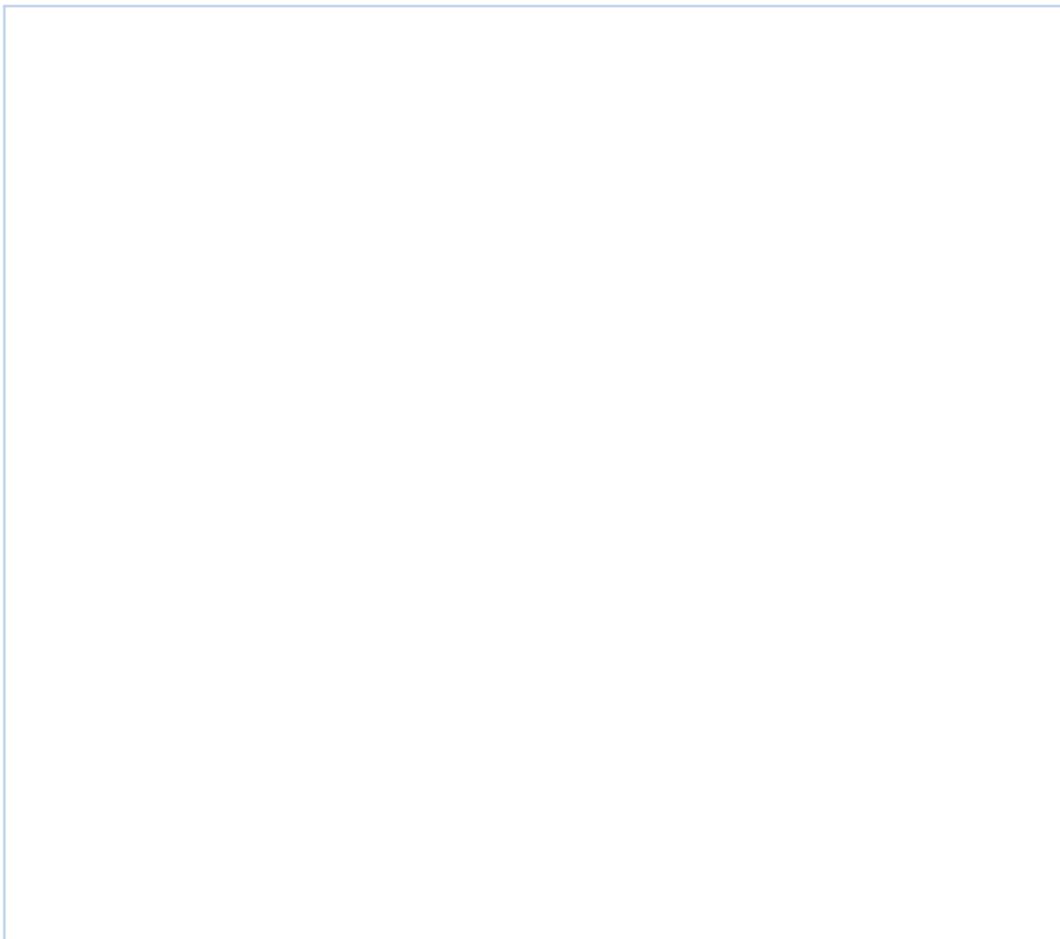
Part B

1. Identify an area for improvement that relates to your current role or something outside work. Develop a plan for change that includes:

    - the reason or reasons why this area may need changing

    - a range of ideas that you may want to investigate further

    - a list of methods you will use to obtain further information for at least one of these ideas

    - a list of other people who will be (or may need to be) involved in the process (include their names and their position titles).

Part B

2. Undertake research using the methods you have listed to obtain relevant information and review and check this against your problem or area for improvement.
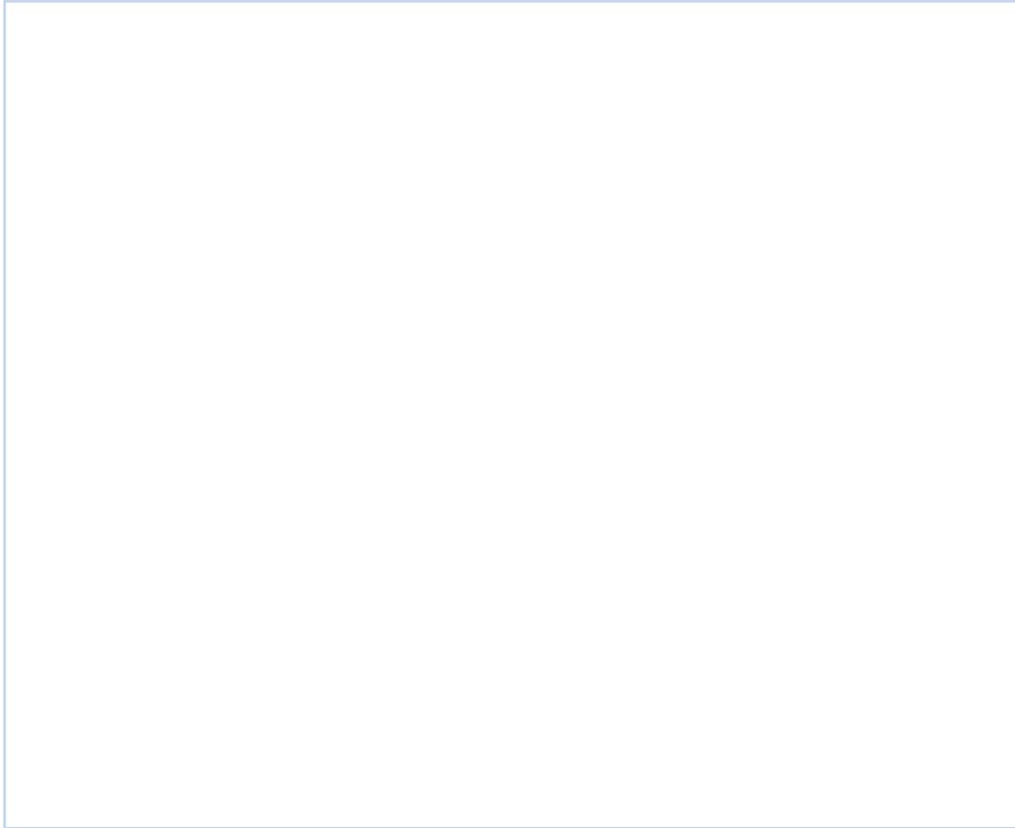
3. Report on whether or not you think this idea is worthwhile presenting, and why.
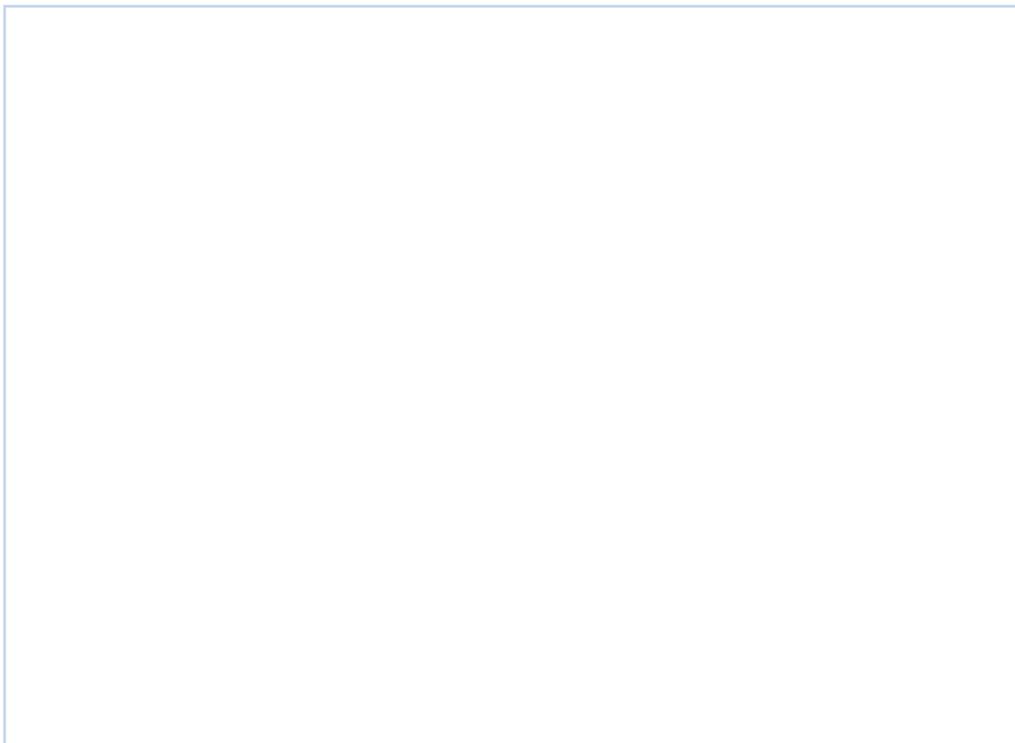
Part C

1. Describe a change that you have made (or wanted to make) in one area of your life, either because you saw a problem or because you wanted to make an improvement.
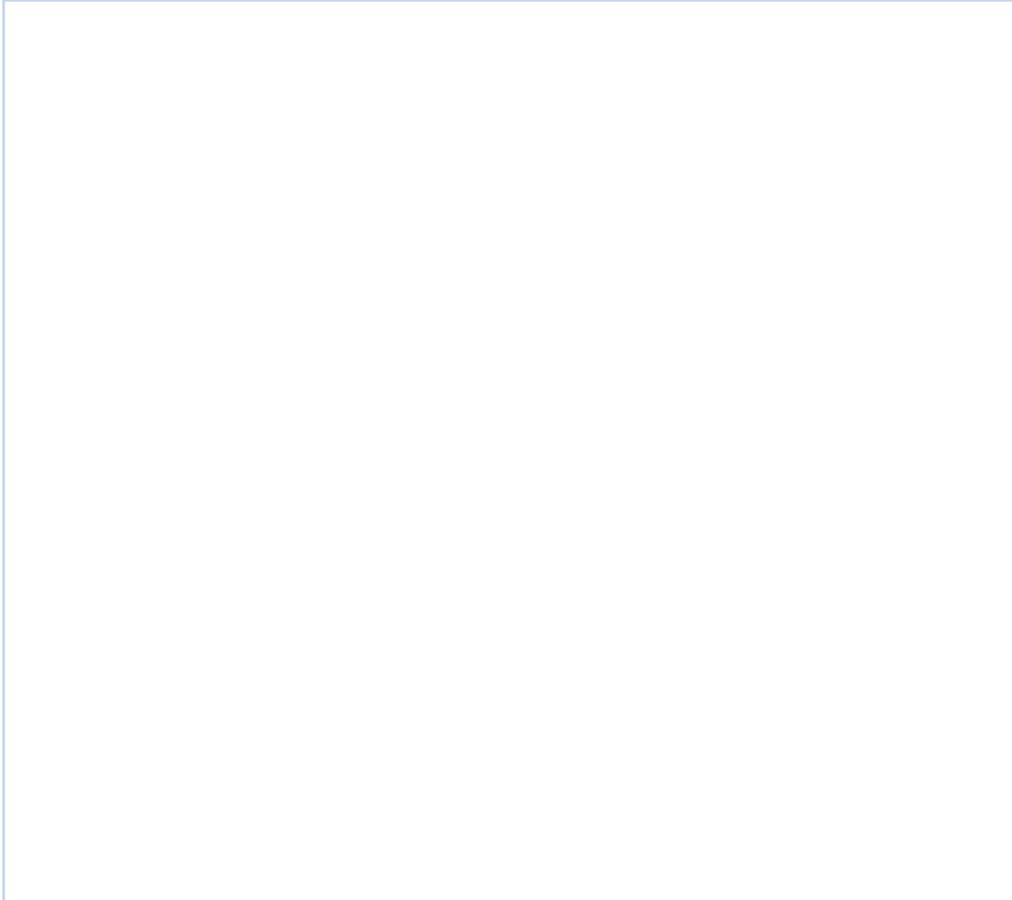
2. How did you know there was a need for change?

Part C
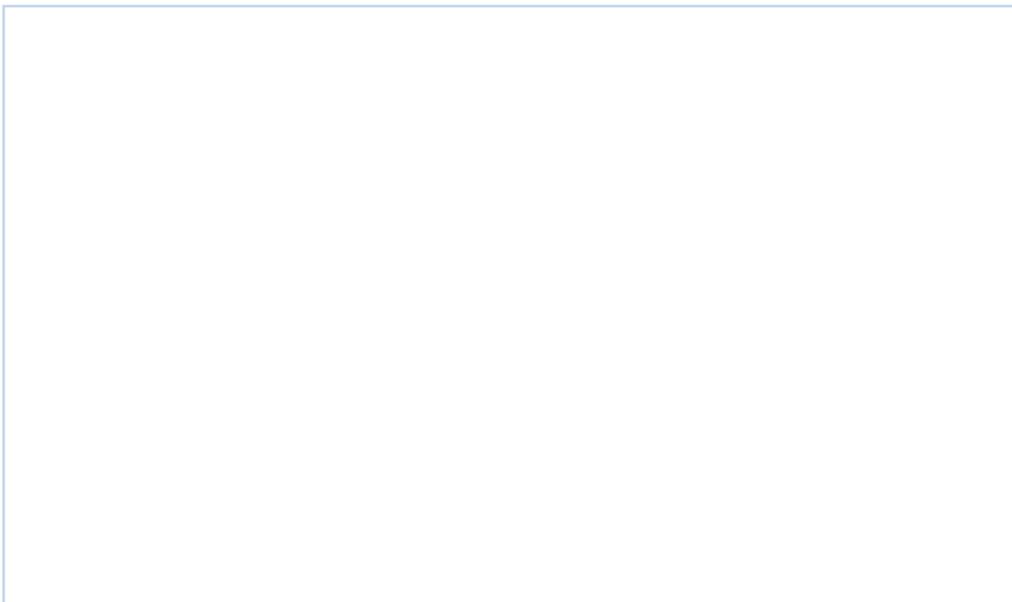
3. Who else needed to be included in some way to help the change come about, and how? Write the names of all those who needed to be included whether or not you actually did include them.

4. How did you come up with at least one idea for how to make the change or improvement you wanted?

5. What kind of information did you obtain about your idea, or might have been helpful for you to obtain?

6. Did you review this information? How?
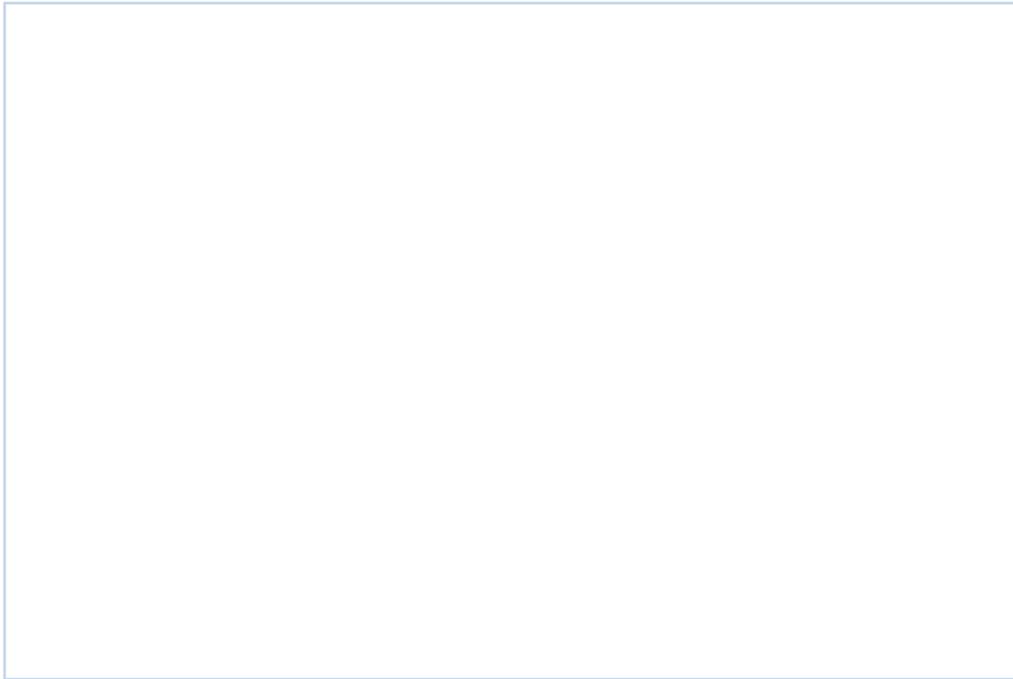
7. Reflect on the process you followed and identify which steps you took to develop your idea. How effective was this process? Did it follow the process outlined in Topic 1? If not, what might you do differently now?

6. Did you review this information? How?
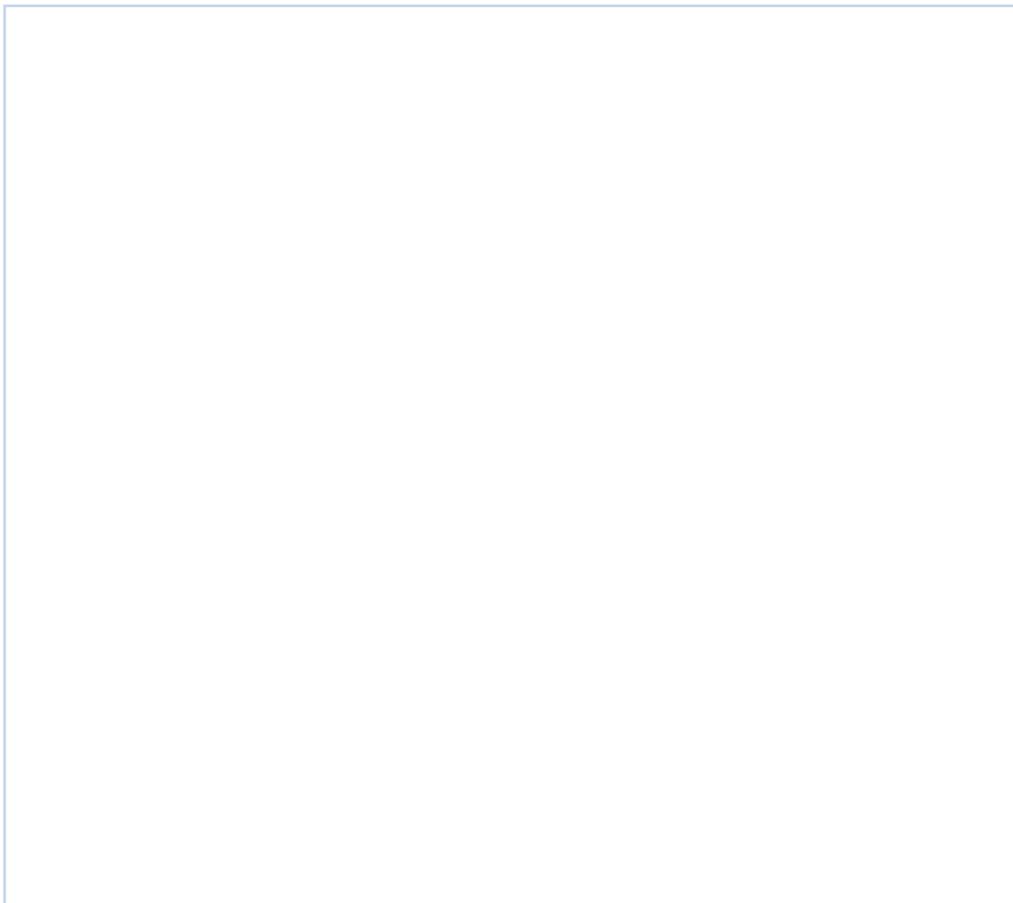
Topic 2
Discuss and develop ideas with others

When you work in an innovative workplace, you will be communicating with others about things that matter – your job, how it is done, and the satisfaction it brings – and making the workplace better for everyone. Because everyone is different, there will be a diverse range of views, which will help your organisation come up with the best results.

If you find yourself in a workplace that does not already openly encourage innovation, you can help create the right environment by sharing your own ideas and encouraging others to do the same. Whether or not your organisation is 'innovative', there are right and wrong ways to go about encouraging innovation. After coming up with an idea, the next step is to communicate it effectively, collaborate with others and then reflect on ideas.

In this topic you will learn how to:

2A   Identify people who may provide input into ideas for improvements

2B   Select the best way of approaching people to begin sharing ideas

2C   Seek feedback on improvement of ideas

2D   Review and select ideas for follow-up

2A Identify people who may provide input into ideas for improvements

You will not be practising innovation all on your own. Sharing your ideas with others and getting their input is essential if you are going to be an effective innovator. It is important to include all viewpoints right from the start.

If you work in a team, another team member may have already thought of an idea and be trying it out. Someone who has been in the organisation for a long time may know why a particular process has been in operation and can help you understand the situation better. Perhaps someone who has moved to a different area, or someone whose work is dependent on yours, can also provide input.

Other people can be of great assistance to you as allies, supporters, information suppliers and promoters. They can help you think more creatively, challenge your beliefs, provide valuable input and detail budgetary or resource constraints.

Help to develop your ideas

Here are some types of people who can help you develop your ideas. You may identify people who will take on two or more of these roles.

Colleague	Colleagues who work in the same area will have a direct interest in your idea, so it is wise to include them. They may be aware of the same issues and have other good ideas about how to fix them. They may also come up with other problems and issues that you have not thought of.
Supervisor	Your immediate supervisor or manager can provide an organisational perspective and can offer advice on the ease and likelihood of ideas being implemented.
Technician	People who have technical knowledge may know how a particular system or piece of machinery works, or they may have specialised knowledge in some other area. There may be technical experts in your team or outside your organisation. Take care if these people are not in your immediate work group or organisation, particularly that you do not disclose confidential information.

Challenger	It is important to have someone with whom you can trial your idea, someone who can ask challenging questions and provide relevant feedback. This might be anyone who you trust and who has the time and expertise to listen to your idea and provide advice.
Promoter	A promoter is someone in your organisation who will actively promote or champion your idea to others in the workplace. Sometimes this person is also known as a mentor or buddy.
Resourcer	Resourcers can provide information about practical things you need to make your idea work. They may offer information on availability and cost of equipment, desks or stationery needed to support your ideas. The person who provides your resources may be your supervisor or manager, or a person with a particular role such as the supply officer. Most ideas will need some extra resources, even if this is just time needed to consider and implement change.
Financier	Depending on the size of your organisation, this may be your direct supervisor who can directly authorise purchases up to a certain dollar limit, or there may be an office accountant or financial controller who is responsible for reviewing budgetary decisions.

Practice task 4

Read the case study, then complete the tasks that follow.

Case study

Siu-Kim works in a leisure centre that has lots of different facilities in a large complex. All of these facilities have different opening hours. Siu-Kim notices that the lights are left on unnecessarily all over the centre. While SiuKim is not directly responsible for all the areas, part of his role is to reduce energy use. Siu-Kim wonders if the others who share this responsibility are having similar problems. SiuKim has an idea. He suggests that a surveillance system and master light switch be installed in the office, so he can control all the areas of the centre without needing to constantly patrol them.

1. Summarise Siu-Kim's problem and ideas for solving it.

2. What information does Siu-Kim need to gather to support his idea?

... continued

3. Which people may be able to provide input into the problem and Siu-Kim's idea? What information can each person provide?

4. What information might each person provide?

2B Select the best way of approaching people to begin sharing ideas

Once you have decided who to approach, the next step is to work out how to communicate with them and get their input. The method you choose will depend on a range of factors including the urgency of the problem, the availability of others and organisational protocols. You also need to take into account individual preferences and be sensitive to other priorities.

Some of the methods you may use to communicate with others:

- Informal discussions
- Team meetings
- Telephone calls
- Email
- Report sheets
- Planning sessions

Important considerations for effective communication

Be strategic about how and when you put forward an idea for improving the workplace. To enhance their chances of getting what they want, children learn how to 'time' asking for ice-cream, a new bike or sleepovers with friends. They also learn how to select which parent or carer to ask for which particular treat and how to put forward their case. Asking people at work to consider your idea also involves learning about timing, targeting and methodology.

Your idea has a much better chance of being listened and responded to if it is put forward at the right time. Never raise an idea when there is a deadline looming, when the person you want to talk to is under pressure or when they are involved in another activity that is taking their attention. Also think about the best location to discuss ideas. This may be in a meeting room or while having a cup of tea.

Processes and protocols

Organisational protocols are the standard or accepted ways of carrying out tasks, making decisions and implementing changes in a particular organisation or team. Sometimes these are formal processes. At other times they are simply part of the 'culture' of the organisation that people know about and understand, just by being there.

If people who work in different locations or at different times need to be involved in meetings, ensure you choose appropriate communication methods so everyone is able to contribute equally. If a number of changes are needed that affect several sections or groups within an organisation, follow a formal process to ensure that everyone is kept up to date so problems can be minimised.

Some organisations only investigate and approve ideas that are presented with appropriate supporting documentation. Some people also have a preference for detailed analysis to be presented with ideas and proposed solutions.

Communicate effectively with people at different levels

You need to consider the degree of formality required when communicating. This is related to the organisation's culture, the seriousness of the problem and the level at which a decision can be made.

Sometimes there are specially designed forms and processes that staff members use to suggest ideas. These are often available in organisations such as government departments, councils, hospitals or schools.

Many organisations are not very formal. People at all levels tend to call each other by their first names, make their own coffee and undertake basic tasks.

However, you need to adjust your level of formality according to the level of the person you are speaking to; for example, you would be more formal when presenting to the managing director as opposed to a colleague.

Decide how formal to be

Use the guide below if you are unsure about how formal you should be in your communication – each formality level has examples of position levels, job titles, responsibilities and suggested methods of communication.

High level

Position level and job titles – Corporate level:

- Chief executive officer (CEO)
- Chief finance officer (CFO)
- Chief information officer (CIO)
- Managing Director

Responsibilities and decision-making power:

- High level of decision-making power
- Creating policies that affect the whole organisation

Suggested methods of communication:

- Formal letter structured with date, appropriate headings, etc.
- Special report or request form if available

High–medium level

Position level and job titles – Senior level:

- Senior manager
- Head/chief accountant
- Human resources manager
- IT manager

Responsibilities and decision-making power:

- Making decisions related to policies, about how those under their control will carry out their duties and what results are to be expected
- Deciding what resources should be supplied

Suggested methods of communication:

- Formal letter structured with date, appropriate headings, etc.
- Special report or request form if available
- Email with brief message and letter or report attached

Medium level

Position level and job titles – Specialist roles:

- Bookkeeper
- Finance officer
- Personal assistant
- Librarian
- Supply officer
- Human resources officer
- IT support specialist

Responsibilities and decision-making power:

- Supporting the main activities of the organisation; these people have the power to make decisions that relate to their area of work

Suggested methods of communication:

- Email with brief message and letter or report attached
- Special report or request form if available
- Interdepartmental memo

Medium–low level

Position level and job titles – Division/business unit level:

- Manager
- Supervisor
- Team leader

Responsibilities and decision-making power:

- Frontline managers who make decisions about how to achieve performance measures and targets

Suggested methods of communication:

- Email
- Telephone
- Face-to-face (informal or arranged)
- Team meeting
- Performance appraisal

Low level

└ Position level and job titles – Team/individual level:
- Clerk
- Secretary
- Information officer
- Receptionist

└ Responsibilities and decision-making power:
- Do a job, carry out orders, meet targets and deadlines

└ Suggested methods of communication:
- Email
- Telephone
- Note
- Team meeting

Practice task 5

Read the scenario, then complete the task that follows.

Scenario

You work in a large charitable organisation as a sales clerk in a team of six. You have found that the online form you use to enter details of donations does not correspond to the questions you ask sponsors over the phone. This means you and others in your team keep two different sets of records, one paper-based and the other online. You want to suggest some changes to the computerised form so that you do not need to use two different methods.

Make a list of up to six people, using their job titles, who you need to involve in the process of change. List the method or methods you would use to communicate with each person (including how formal you would be) and what kind of input you would require from each of them.

... continued

Who I would talk to	How I would communicate with them	What information or input I would need

... continued

2C Seek feedback on improvement of ideas

Communication always has the best outcomes if it is a two-way process. Presenting problems and coming up with ideas is a great start. Obtaining feedback from others who will be interested in the outcome is equally important. This provides you with valuable information that will help you decide whether your idea has merit, or if it needs to be revised or changed in some way.

There are many different ways of obtaining feedback. Discussing ideas and asking questions are great ways of obtaining feedback, as are using creative strategies such as brainstorming and 'what if' sessions. Below are three suggested ways of obtaining useful feedback.

Talking to others

Talk to colleagues or supervisors and ask questions. Sometimes feedback will be given freely at work; other times you will need to ask for it. You can ask one or more people to tell you what they think, or you can ask for written responses. Getting individual feedback generally provides different responses from those that are received in group situations.

You may choose to provide a forum in which colleagues and supervisors can work through structured questions, or have a free flow of ideas about a change to a work process.

Brainstorming

Brainstorming allows a group of people to consider formulated thoughts and to apply their diverse perspectives to how any solutions may impact or be perceived. It is important to remember that contributions to a brainstorming session are all accepted; there is no judging.

For example, you could suggest that your team has regular brainstorming sessions in which a particular area of work is discussed. The sessions could focus on issues and risks associated with the latest action plans for a work approach or project.

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'What ifs'

'What ifs' allow you to gain other people's perspectives on your ideas and proposed solutions. You start off with your idea, putting 'what if' in front of it. When many people answer 'what if', you are able to clarify many potential consequences and repercussions of your idea. You could run a 'what if' session or seek individual feedback to your 'what if' question from a range of key people.

Develop options and possible variations

During and after feedback, you will have the opportunity to develop a greater understanding of the situation and possible variations to the original idea. Perhaps you will come up with a new idea, or several new ideas. New possibilities can be added to your concept using the suggestions below.

Rethink the idea
Think through the idea again by revisiting the original problem or situation that led to the need for change.

Incorporate all information
Incorporate all information obtained about the resources that would be required for the change – include such things as budget or time limits, competing priorities, other changes that are taking place and any costs involved.

Incorporate other ideas
Incorporate other people's ideas and feedback to decide whether you have the best solution or if something else is needed.

Test and modify ideas
Test any modified or new ideas by presenting them to others (preferably people who have already been involved in the process).

Practice task 6

Use this table to complete the following tasks.

1. List four strategies to solve a problem such as a call centre being inadequately staffed during operating times.

2. Seek verbal feedback from at least two different people on your strategies. Do not give them any instructions other than asking them to talk about your strategies and suggest how you could improve them. Write down their key points.

Strategy	Feedback 1	Feedback 2

2D Review and select ideas for follow-up

You have been following a systematic process for developing ideas. First, you obtained supporting information for an original idea of yours about something that needed to change. Then, you explored the usefulness of finding people who can and should provide extra input, how to share your ideas and also how to receive feedback from them. Now, you need to review the feedback you have received and make any necessary changes.

Document feedback

Feedback usually needs to be documented in some way before it can be used. There are many ways you might document your feedback; however, three common methods to use are a key points summary, a SWOT analysis and a pros and cons table.

When producing a key points summary, you may like to add the name of the person who raised each point. When using a SWOT analysis table, you will describe your idea's strengths, weaknesses, opportunities and threats. Finally, when using a pros and cons table, you create two columns listing arguments in favour of the idea in one, and those against in the other.

Reasons for documenting feedback may include:

- keeping track of the historical development of an idea
- acknowledging and valuing others' time and effort
- saving time by not going back over steps or having people re-raise issues that have already been dealt with
- ensuring that you get the best possible outcome
- providing evidence that you have followed all necessary steps, in case problems arise later.

Review your ideas

Once you have documented the feedback received, you need to review and adjust your original idea or ideas. If there are a lot of reasons, or one major reason, why the original idea will not work, you may need to come up with a new idea. If there are only a few minor issues, the idea might just need a little tweaking.

Rate your ideas

Once you have all the information in front of you, you can determine the likelihood of success by using a rating process. Below is a rating scale where 1 is deemed to have a high probability of success, while 5 is the least likely to succeed.

Key for a suggested rating scale

1 High probability of success as originally stated

2 Probability of success after some changes

3 Idea needs further work in order to determine success level

4 Low probability of success – major changes needed or new ideas

5 Idea unlikely to succeed – new idea/s needed

Practice task 7

Read the case study, then complete the tasks that follow.

Case study

Siu-Kim, who works in a leisure centre, has noticed that the lights are left on unnecessarily all over the centre. He has a suggestion for reducing energy use by installing a surveillance system and master light switch in the office.

Siu-Kim has contacted the managers of the childcare centre, gym and coffee shop, his supervisor and the others involved, about his idea. He has spoken with everyone in detail and gained their feedback about his idea. He has drawn up a list of pros and cons as shown below.

Problem: lights being left on in the centre	
Idea: purchase and install surveillance equipment and master light switch in office	
Pros	**Cons**
• Will save Siu-Kim and other office staff time • Will save electricity (environmental benefits as well) • Will save money	• Very expensive – no budget available • Will take time to install • Staff will need to be trained to use equipment • Might not save money if staff are not watchful

1. Rate the likelihood of Siu-Kim's idea being implemented using the rating scale where 1 is deemed to have a high probability of success, while 5 is the least likely to succeed.

... continued

2. Are there ways this idea might be modified to eliminate the cons?

3. What new ideas might be investigated that could achieve the desired result, while getting rid of the cons?
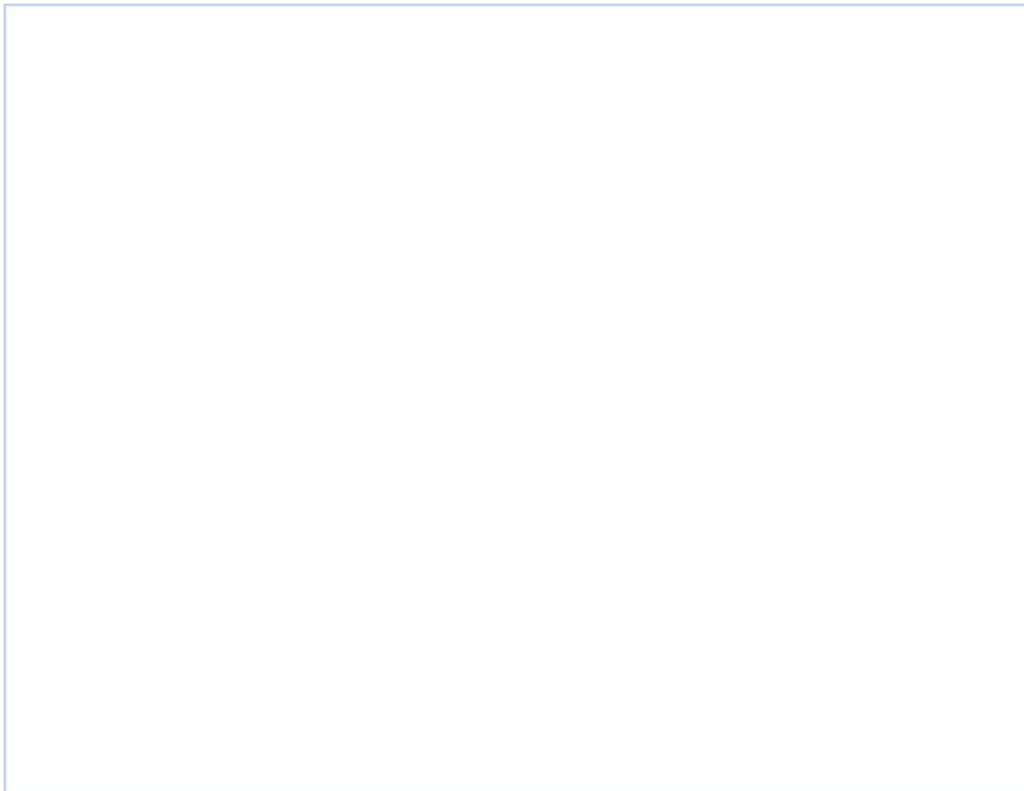
Summary

1. Effective innovation follows a systematic approach.

2. Communicating with the right people is important.

3. Using the most appropriate communication method achieves the best results.

4. Using feedback to evaluate ideas is an essential part of the innovation process.

Learning checkpoint 2
Discuss and develop ideas with others

This learning checkpoint allows you to review your skills and knowledge in discussing and developing ideas with others.

Part A

Prepare a questionnaire of at least ten questions that you could use at work to find out the following:

- What systems are currently in place to communicate ideas

- How formally or informally staff communicate ideas to others, and what methods are used

- Whether innovation is actively encouraged, welcomed or not really supported

- How ideas are reviewed and followed up

- What ideas have been implemented, if any, and what the results are

- What ideas are being investigated, if any, and what stage they are currently at
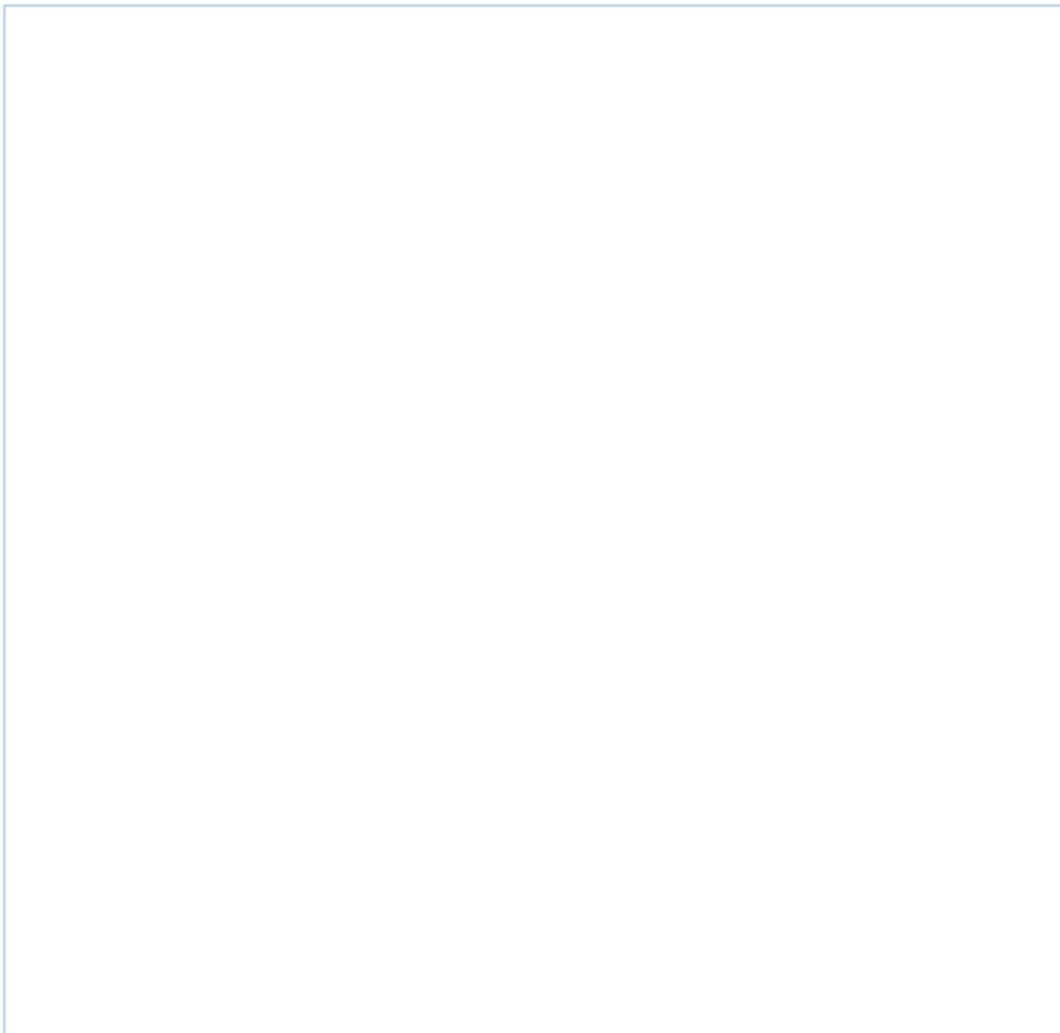
Part B

1. Develop a list of people in your organisation or an organisation you are familiar with. Detail their positions and what input, knowledge or resources they might provide if you wanted to make a change.

2. Identify the best methods for communicating with each of these people, taking into account each person's role, accessibility and communication preferences. Find out if there are any standard protocols for presenting ideas in your organisation. If so, list them here. If not, describe a method you would follow to share ideas and get feedback. Make this suitable for the size and structure of your organisation.
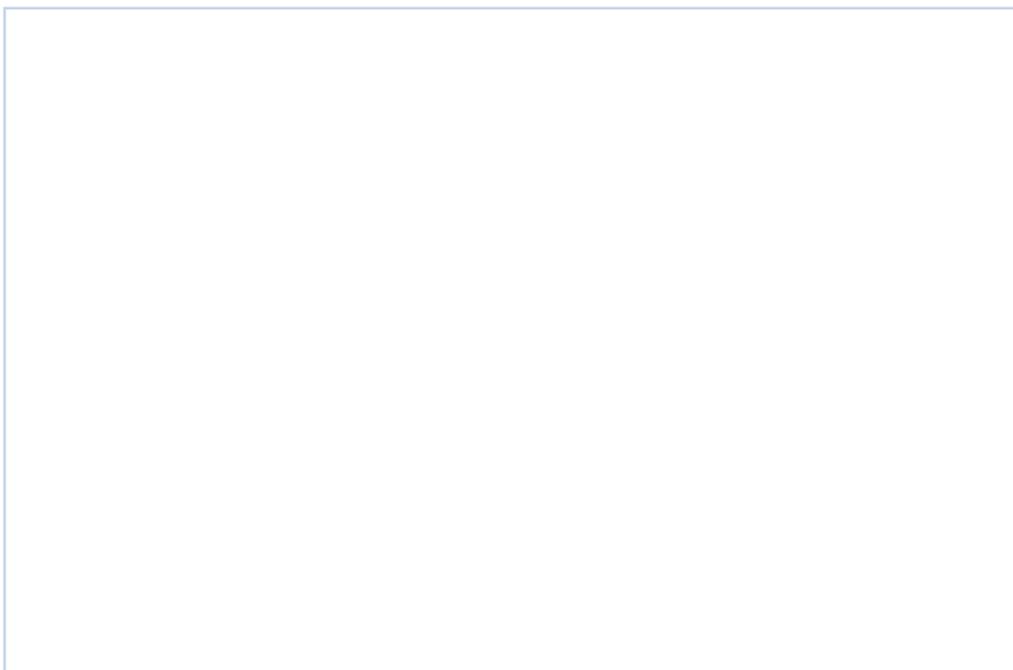
3. Develop a time line and a process for receiving feedback, and reviewing and following up on relevant ideas.
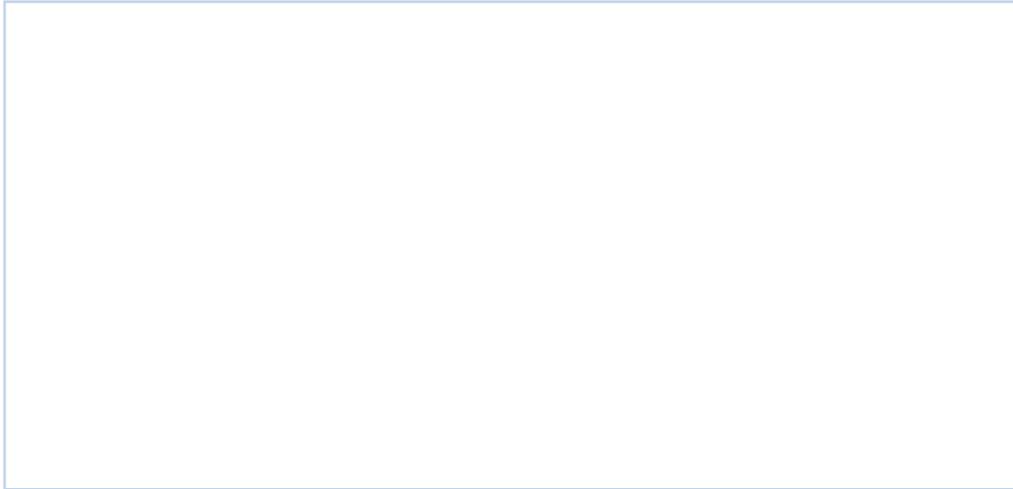
Part C

Read the case study, then answer the questions that follow.

> **Case study**
>
> Samara has worked as an administration clerk in a spare parts manufacturer for the past six months. She started as an inquiry officer in the accounts department, and then became a payroll clerk.
>
> Samara feels that the software the payroll area is using is out of date. During an initial conversation with her supervisor, she is told that finances are an issue.
>
> Following this conversation, Samara investigates further and finds out that the system they are using has been identified as faulty by the company that designed it, and they are offering a free upgrade. They are also providing low-cost training to one representative in each company. Samara thinks it may be a good idea to obtain the upgrade, and to undertake the training herself.

Help Samara present a letter to her supervisor, Tom Johnston, outlining the reasons for wanting change, explaining her idea for a solution and what will be gained, and asking for his feedback.

1. Your letter should be approximately one page long and presented in a logical format that is easy to understand. You can come up with your own headings or use these:

   - Reasons for change

   - Possible solution/s

   - Supporting information

   - Recommendations

2. After reading Samara's letter, Tom tells her that he thinks the upgrade and training is a great idea. Write a list of the things Samara may need to do after Tom has provided this feedback.
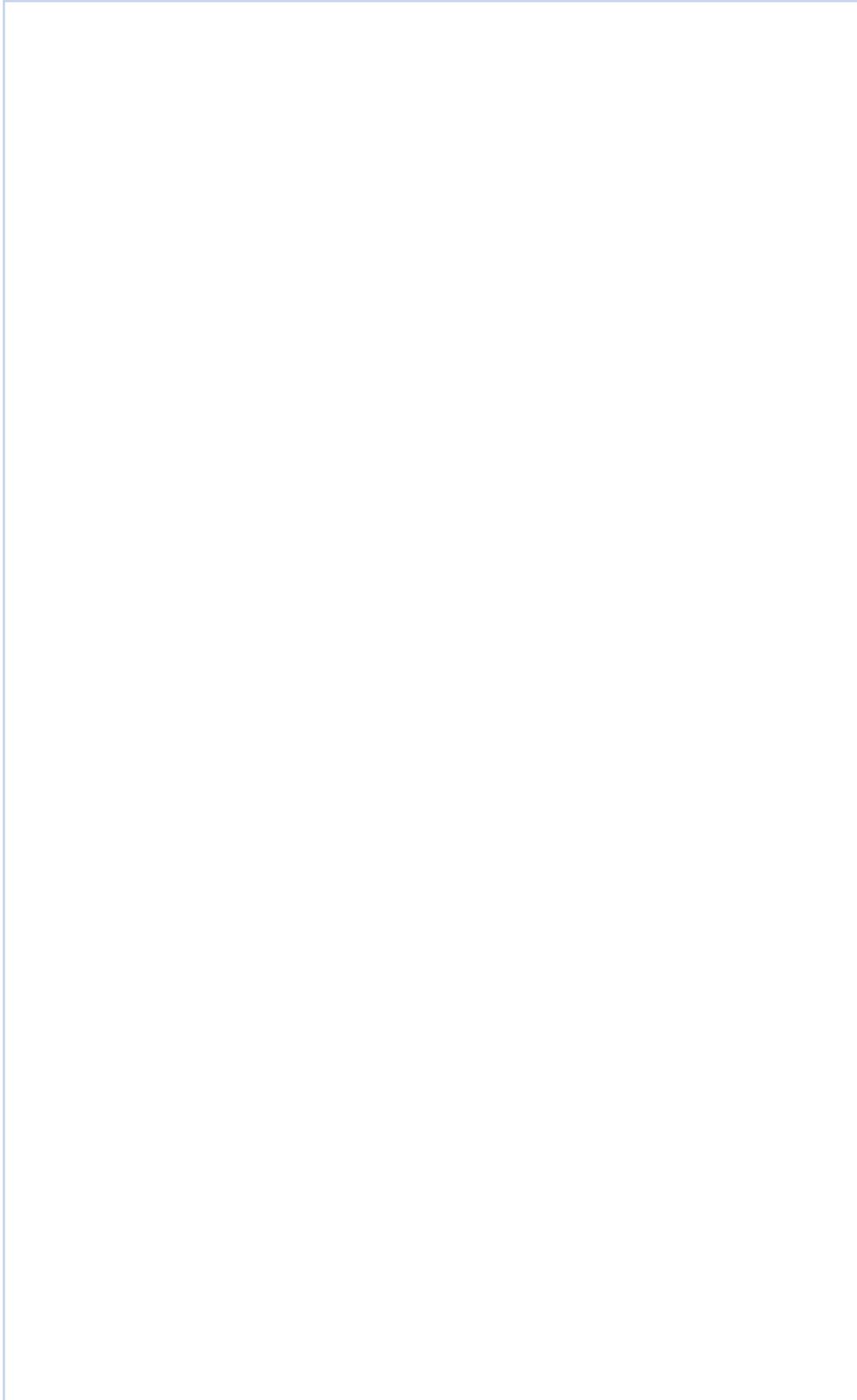
Topic 3
Address the practicalities of change

Once you have identified a problem or need for change, and come up with the best way to make it happen, you will probably be quite excited about implementing the change. It is important to ensure that everyone knows what will happen, especially if it will change the way they work. You also need to make sure you have authority from the right people and that you implement changes in a way that has minimal disruption to the workplace.

In this topic you will learn how to:

3A   Take action to implement routine changes

3B   Identify and articulate issues and practical processes

3C   Present ideas and practical suggestions about improvements

3A Take action to implement routine changes

How does an innovative idea become a new work practice? Innovation in the workplace is not about taking things into your own hands and making decisions without communicating with others. Unless you are an owner or manager, the final decision will usually be up to others to make. However, if you can show how your idea will benefit the organisation, your ideas are more likely to be accepted and lead to greater satisfaction for yourself, your work colleagues and the organisation's clients.

Whether the change is small or large scale, innovation generally follows a process that goes through several stages.

Stages of innovation

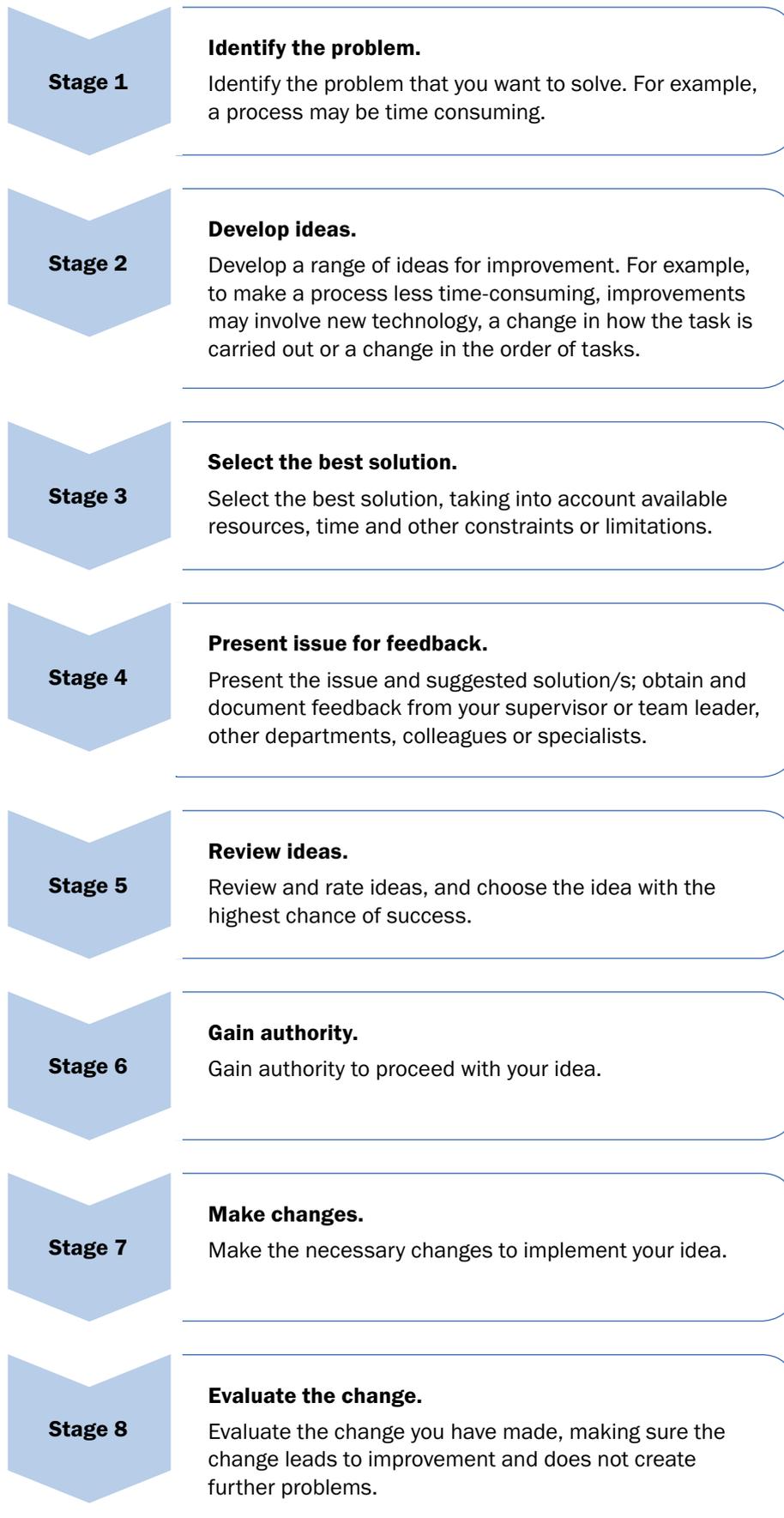Ideas do not always lead to change straight away. Your organisation may decide not to implement any changes at that time. This does not mean the idea should not have been raised. Someone may still thank you for your foresight at a later date.

Below is a summary of each of the stages of innovation and some further information about each. Note that stages 4–6 all involve obtaining approval to implement change.

Problem-solving stages

	Identify the problem.
Stage 1	Identify the problem that you want to solve. For example, a process may be time consuming.

	Develop ideas.
Stage 2	Develop a range of ideas for improvement. For example, to make a process less time-consuming, improvements may involve new technology, a change in how the task is carried out or a change in the order of tasks.

	Select the best solution.
Stage 3	Select the best solution, taking into account available resources, time and other constraints or limitations.

	Present issue for feedback.
Stage 4	Present the issue and suggested solution/s; obtain and document feedback from your supervisor or team leader, other departments, colleagues or specialists.

	Review ideas.
Stage 5	Review and rate ideas, and choose the idea with the highest chance of success.

	Gain authority.
Stage 6	Gain authority to proceed with your idea.

	Make changes.
Stage 7	Make the necessary changes to implement your idea.

	Evaluate the change.
Stage 8	Evaluate the change you have made, making sure the change leads to improvement and does not create further problems.

Discuss change

During all stages of the change process, you need to communicate with others. Sometimes it is hard to know when it is the best time to communicate, and how much information you need to give. You do not want to bother your supervisor every time you get a little more information. As a guide, think about this in terms of 'action' and 'decision', as defined below.

Action

Action means that you are being busy undertaking one or more activities related to your idea, such as gathering information or preparing a report. During action stages you may be communicating with others in your team, suppliers, service people or specialists inside and outside your organisation. You need to give other people just enough information about the idea so they can help you.

Decision

Decision means that you have enough information to brief people so they can make a decision to move the process forward. Prior to a 'decision' discussion, you need to make sure you have all the relevant information at hand, in a useful format. The person you are presenting your idea to does not want to receive a handful of disorganised brochures or feedback forms, or a series of unconnected thoughts. You will know when it is 'decision' time because you will find you can't really do anything more until you get decisive feedback.

Example: action versus decision

Action	Decision
Getting a quote from a company to move the large fish tank; for example:	Once you have all the information related to moving the fish tank, you may communicate with the manager as follows:
'Good morning. We are considering making some changes to our reception area, and this involves moving our large fish tank. It is four metres wide and half a metre deep. It is currently fixed to a wall and we would want it to be freestanding in the entrance to separate our two service areas. Could I get an idea of how much this would cost please?'	'Good morning Mr Cousins. I have compiled a list of all the changes related to the proposed rearrangement of the reception area and have received a number of quotes. There are three quotes relating to each aspect of the rearrangement: moving the fish tank as per our previous discussion and new lighting and couches. I have attached the quotes to this email. Please let me know if you would like me to proceed and, if so, which services you would like to use.'

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Routine changes

Routine changes usually relate to your role and those of one or two others you work closely with. They can be put into place quickly, cause minimal disruption and do not cost a lot of money or use a lot of resources. You may make them because it makes something you do easier or quicker, or because it obtains a better result. Routine changes either do not require approval or have already been approved, either because you have been told or because it is part of your job description.

Routine changes involve minor adjustments to work practices. You may not be able to change what you actually do in your role and the things you have to achieve, but you may decide to do things in a different order or change the way you do them. Below are some routine changes for which you may still need management approval.

Routine changes that need to be supported by management include:

- implementation of new team reporting procedures
- sharing minor tasks among team members to spread the workload
- changes in systems access to allow team members to self-manage their work.

Example: routine changes that may not require approval

Routine changes that may not require approval include:

- collecting the office supplies at the same time as you collect the mail, so you save a trip
- transferring data from a Word document to an Excel spreadsheet so you can prepare reports more efficiently
- giving your supervisor all the work that needs signing twice a day instead of interrupting him or her five or six times a day
- changing your lunch break to a more suitable time to cope better with client needs.

Implement the changes

When you do implement routine changes, you need to make sure everything is planned appropriately and all tasks are completed.

Think carefully about setting a date or time for change. Sometimes changes can be implemented immediately, but at other times it may be best to wait. You are best to avoid peak work periods such as while the monthly report is being finalised. You may set your time for change to fit around business cycles such as the end of the financial year, or introduce it after a major project is completed.

Advising others about your change is courteous and helps you to make a smooth change. You may advise people via an email or in a staff meeting, giving them ample notice and a reminder just before the change is to occur. You will not want to be answering a lot of questions during the implementation or while you are getting used to a new way of doing things.

Practice task 8

1. Complete this table by ticking whether you are in 'action' or 'decision' mode.

	Action	Decision
Asking for a laboratory report		
Brainstorming ideas		
Chatting to a team member		
Getting approval		
Identifying a problem		
Obtaining prices		
Phoning suppliers		
Presenting a detailed report		
Proposing a solution		
Recommending a quote		
Submitting a budget request		
Testing equipment		
Thinking creatively		
Writing a report		

2. You are going to introduce a new filing system so that the client records are kept in name order rather than by client number. Currently, whenever a member of the sales team asks you for a client file, you have to look up their number on a database before accessing the files. Using an alphabetical system will make things much easier.

   List some things you could do to ensure this change is made with minimal disruption.

3B Identify and articulate issues and practical processes

When the change you want to make will affect others, or is likely to take some time or be costly, it is very important to make sure you have thought about the issues and problems that may arise. Making big changes also means you need to do more planning. The major issues that affect change are described below.

Approvals are required

You need to ensure that you have the appropriate authority to proceed. While your idea may have been supported in a meeting, or your boss gave verbal agreement when you made your presentation, this does not necessarily indicate that you have the authority to proceed.

It is always best to get approval in writing: an email, signed form or initials and a date on your letter may suffice.

Relationship of the idea to organisational priorities

You need to ensure you have taken into account other things that may be going on in the organisation generally, as well as in your immediate work area. Consideration to deadlines and peak periods also need to be taken into account.

For example, moving furniture may need to be done at the end of a work day or after work so as not to disrupt workflow.

Cost of implementation and logistics

Costs need to be considered carefully before implementing change.

For example, it may be much cheaper to hire a truck on certain days of the week; people who install machines may be able to work more quickly on days or times when there are fewer workers in the office. You also need to take into account any down time while the change is happening.

If a number of things need to happen, it is important that these are done in the most efficient way.

For example, a new software package can't be installed until a computer system is upgraded; new desks and equipment must be provided before new staff members can start working. A flow chart or run sheet can help eliminate these problems.

Communication approach

Everyone who is involved in the process – decision makers, specialists, advisers and all those who will be directly affected – needs to be informed. There may be people – clients, sponsors, working partners – outside your organisation whose needs may not be met at a particular time and they need to be kept informed. If communication is not planned, costs can increase and work may be delayed.

For example, moving a desk to a place that has no computer point, because the technicians were not advised, will disrupt the worker who needs to complete work on time; turning off the phone system without warning may frustrate clients.

Personalities and philosophies of others in the workplace

Everybody works, thinks and responds differently; some people cope with chaos and confusion, while others need to maintain a certain amount of structure. It is important that differences are accounted for and respected, especially during change.

Internal politics

No organisation is exactly like another, even if they provide the same services. This is to do with organisational culture and politics. Culture and politics affect the ways that people interact with each other and carry out their tasks. An organisation's culture is not written down anywhere but it is well known to the people who work there.

For example, one branch of a large organisation may have regular morning teas, a footy sweep and expect everyone to bring a cake on their birthday. In another branch, staff might rarely use the tea room, but go down to the local coffee shop in groups of two or three when they take their breaks. Making changes in a way that reflects your organisation's culture may mean that you ask someone to drill holes in the wall of the office at a time when everyone is in the coffee shop or having birthday cake in the tea room.

Contingencies

No matter how much we plan, something may cause disruption, and accidents or unplanned events may occur. These sorts of things are called contingencies. Although we can never cover all possible contingencies, we should try to imagine as many as we can and make plans to deal with them. Sometimes history may tell us that something went wrong last time. For example, last time we tried to increase the speed of the fax machine, the paper went flying everywhere, so this time we need to put in a barrier. Sometimes an expert will predict an event, so you need to make plans around this likelihood.

Practice task 9

Read the case study, then answer the question that follows.

Case study

Ben works for an insurance company. He knows that everyone thinks it is a great idea to remove the partitions between himself and the rest of his team, including the manager – this was confirmed in the staff meeting. Removing the partitions will make it easier for Ben and his team to work; they will not have to get out of their seats every time they need to ask a question. Ben organises for the maintenance crew to come in on Friday afternoon when it is quiet – there is hardly anyone around so no-one will be disrupted.

What else does Ben need to do to ensure that the change happens smoothly and with minimal disruption? Provide an explanation for each suggestion.

3C Present ideas and practical suggestions about improvements

It is important to choose the right method of communicating your idea or suggestion. Your communication methods will vary depending on who your audience is, how many different people or audiences you need to communicate with, the level of formality that is required and the amount of time you have to prepare and present. Sometimes more than one method of presentation is appropriate. The three main categories of presentation are described below.

Verbal presentation

Verbal presentations include one-on-one meetings with your manager or supervisor, or group meetings such as with your team or a focus group. You may communicate face-to-face or via the telephone. Verbal presentations may be done in a structured or ad hoc way; your choice will largely depend on the time you need to take, and how things are done in your organisation.

Verbal presentations are generally used when the people who need to know are located in the same office or there are regular team meetings. This is not a good method to use when the information is complex or would take a long time to describe, as people will not retain all the information. The downside of a verbal presentation is no paper or electronic record, so your presentation may be forgotten.

Written presentation

If you want to provide supporting information or the process needs an in-depth description, you may want to produce your presentation in writing. This also works where you need to present it to people you do not usually see. This has the added bonus of allowing the reader the chance to select when they will read it. The downside is that it may get filed away somewhere for later and be forgotten.

Written presentations include reports, memos and emails (with or without attachments). Some organisations have special forms that are used to present ideas or information.

Technology

Some organisations have set processes for making presentations using technology. Presenters may be required to use technology such as PowerPoint, datashows, video conferencing or webbased interactive programs and blogs. Even if your organisation does not usually use technology, you may like to create an extra impact by making your presentation more interesting.

Using technology can be expensive, and can take longer in the set-up stages so is better reserved for major changes. Your organisation also needs to have the technology available. This method can be useful if people need to access the presentation at different times.

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Present the information

Now you know how to present ideas, consider what information you need to present. People need enough information so that they know what is going to happen (the change), why it is happening (the original issue or problem), how it is to happen, how it affects them and how you expect the change to be of value. There are seven parts to a presentation that involves putting forward a case for change, as shown on the next page.

Key presentation points

1
Problem and reason for change

This is the 'setting the stage' part of the presentation in which you provide the background material and outline the exact nature of the original problem or issue.

2
Issues

This is where you outline all the reasons why it is a problem for you, others in your team and/or the organisation as a whole.

3
Solution

This is the best option as determined after careful deliberation, research and getting feedback from others. Show how it will fix the problem or lead to improvements

4
Discarded solutions

These are other things that could be done to overcome the problem but were not as good as the solution chosen.

5
Problems that may occur

This is where you outline disruptions that are likely to occur while the changes are taking place. Reassure people that these will be minimal and not long-lasting.

6
Effects

Show how your change will benefit the organisation. You want to maximise people's comfort about the change and minimise any likelihood of the change being unsupported because it will have a negative impact on another aspect of the organisation's work.

7
Costs

Costs may be in terms of financial expenses, resources, time or effort. Reassure people the impending change is a cost-effective solution.

Practice task 10

Read the case study, then complete the tasks that follow.

Case study

Noam works on reception, and is responsible for taking lunch orders for up to 40 staff to the café each day at 11.30 am. This allows an hour for the lunches to be ready by 12.30 pm. People write their orders on bags or pieces of paper and put them in a box at reception. Sometimes someone's order does not get lodged because it gets to Noam too late. Sometimes people miss out because they are not able to drop their order at reception by 11.30 am.

Noam has come up with the idea that everyone who wants him to order their lunch that day should email him by 11.30 am with their requests. Each day at 4.00 pm he will use email to advise of any changes to the menu for the next day. Noam believes this is a good plan because if someone knows they will be out in the morning they can email through their order the night before. It will also save time in the café because he can compile a big list and print it out to take to them and they won't have to deal with scraps of paper with messy handwriting.

Noam's boss and the café manager have approved the new system and left it to Noam to implement the changes.

1. There are no staff meetings at Noam's workplace. Select a method (or methods) for Noam to present the changes and explain how you think it will work. Why did you select this method?

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2. Use the key presentation points discussed in this topic to help you list all the information Noam should include in his presentation/s to those affected by the change.
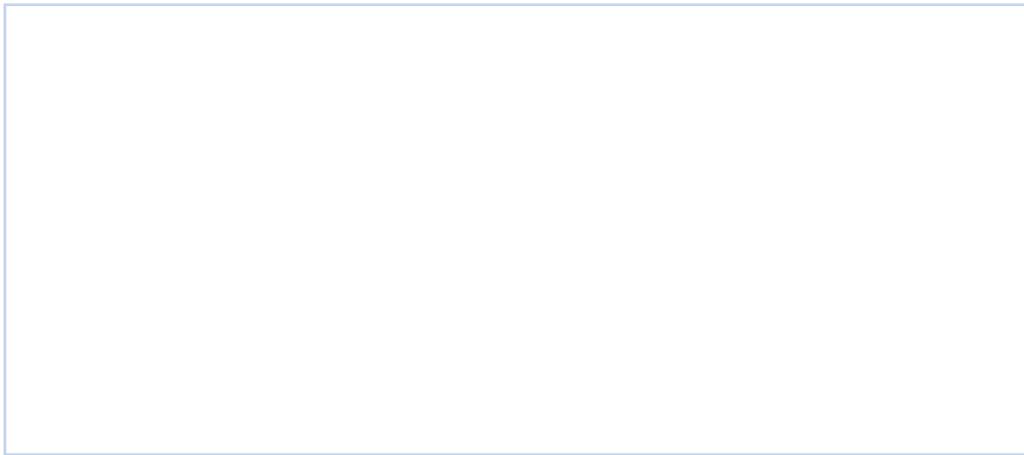
Summary

1. All changes should be planned, no matter how small.

2. Communication with others is essential.

3. You need to plan for issues and potential problems.

4. Ideas should be presented effectively and fully.

Learning checkpoint 3
Address the practicalities of change

This learning checkpoint allows you to review your skills and knowledge in addressing the practicalities of change.

Read the case study, then complete the tasks that follow.

Case study

Susana has been working as an office administration assistant for about six months. She has had plenty of time to learn her duties and has realised there are things she can do differently that will help her to do her job better.

Susana makes a list:

- Collect the mail on her way back from lunch instead of in the morning (when she gets there it is often not all sorted).
- Email questions to her supervisor rather than waiting for him to be free to meet with her.
- Change the team meeting day to Friday when it is less busy in the office.
- Institute a footy-tipping competition.
- Purchase a printer-fax-phone machine that can sit on her desk so she can cut down on trips to the printer room (currently about 25 times per day).
- Get other people in her team to relieve her from the reception area for one hour each day so she can type up her reports in peace.
- Order some indoor plants from Plants-R-Us for the waiting room.

1. From this list, identify which of these changes are routine and can be implemented quickly, and which ones are more complex. Explain your reasons.
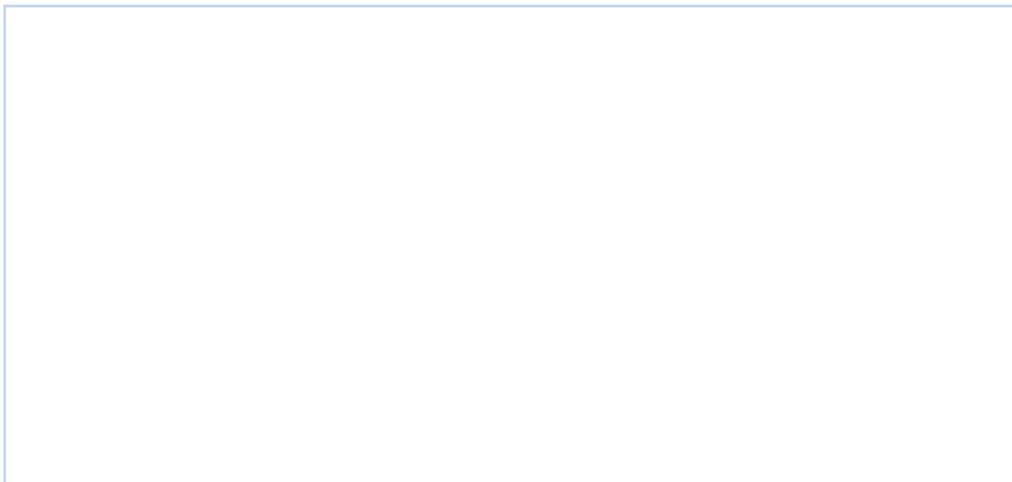
2. For the more complex changes, identify one potential issue for each and a practical way Susana might limit the chance of this causing problems.

3. Prepare a report for Susana to submit outlining all the changes she wants to make; show an understanding of the issues and what is involved.