

BEST PRACTICE RECOMMENDATIONS - CASE STUDIES

CATEGORY : COMMUNICATIONS

ABSTRACT

Which Best Practice Recommendation did your firm implement?

- What is your firm's policy?
- Does your policy have any innovative characteristics/aspects?

Summary of Key Objectives and Lesson Learned

- Who are the significant individuals, teams, and institutions?
- What are the significant lessons derived from the case?

PERSPECTIVES

Background of Workplace:

- What was your policy or circumstances prior to implementing the BPR?
- What was the reason for implementing the change? What was the turning point that pushed your firm to make a change? What prompted the need for change? Was it a first time occurrence?
- What is your firm make-up? How would you describe your firm culture? What is your firm history?
- Is there any other relevant background info that explains the circumstances?

Viewpoints and Challenges of Employer and Employee

- Who initiated the process of change? Was it an employee or employer driven decision process? Was it a management decision or grass roots initiative?
- Employer Perspective: What were considered to be financial challenges with implementing a new policy? What were considered to be scheduling and resource management challenges with implementing the new policy?
- Employee Perspective: What are the employee retention benefits considered when implementing the new policy?

PROCESS

Decision Making

- Describe the decision making process and the key decision makers.
- What legal considerations impacted your development of this policy?
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Implementation

- How was this policy implemented?
- What procedures are in place for determining eligibility?
- Would you be willing to provide a copy of your policy? (Optional)

Growing Pains

- What challenges did your company face in implementing the new policy?
- How did your company adapt to the new policy?

OUTCOME

Lessons Learned

- What are the lessons learned from the case?
- What advice would give to other firms wanting to implement a similar policy?

Achievements

- How are you determining if implementing this policy has been successful for the firm, for the office culture, and for the employee?
- How has your policy change affected the office culture or how did the office culture influence the policy change?
- What are the measurable achievements (quantitative: profitability and utilization) the company has seen since implementing this policy?
- What are the non-tangible achievements (improved moral, office culture, employee retention) the company has seen since implementing this policy?

Firms Next Steps

- What are your firms next steps regarding this policy?

BPR CATEGORY SPECIFIC QUESTIONS

- How does this relate to and coordinate with an orientation or mentorship program?
- How does this relate to professional development and training opportunities?
- What length of time is appropriate for the on-boarding program?
- How much of a time commitment is expected of the assigned staff or Shepherd?
- Does this apply to part-time employees?
- How are unique situations and requests accommodated? Does the employee handbook provide a process for addressing unique situations?
- How often should the employee handbook be updated?
- How does the firm gauge employee perception of policies and policy implementation to ensure that perception matches the intent of the policy?
- How will amendments to the handbooks be handled?
- Is an employee signature required after initial review and/or after any amendments?
- Does the firm regularly review and adjust values, goals, and vision?
- How are the firm's values, goals, and vision communicated to all employees?
- How does the firm assess if firm policies align with goals and vision?
- Did employees have a voice in setting goals and vision?
- Are employees empowered to promote the firm to future clients?
- Does the firm communicate what types of projects the firm wants to pursue and what special services the firm provides?
- Do employees share the firm's vision and goals and feel that the office culture reflects that vision?
- Do employees feel confident that their job is secure?
- Are the firm's values reflected on a day-to-day basis in business decisions?
- Are employees informed of goals and empowered to achieve them?
- Are tasks that don't produce billable hours included in workflow?
- How do you provide support to an employee experiencing a life event?
- When comparing workload levels, are you comparing employees with the same skill levels?
- Are you encouraging engagement and talent growth by providing growth opportunities through project assignments?

- When you assign a more complex project to an employee, do you let them know why you assigned it to them?
- Are you providing equal opportunities to all employees?
- When workload levels are high across the firm, do you have a list of priorities? Do these priorities shift daily, weekly, or remain steady?
- When an employee indicates they are overwhelmed, do you acknowledge and validate their perspective? Is workload adjusted?
- Do the metrics used to measure employee performance align with and support firm goals, values, and culture?
- Do the metrics used take into account added value to the firm beyond revenue-based performance?
- Is the evaluation process fair and unbiased?
- Are the metrics used for performance evaluation communicated to employees?
- Are employee performance reviews or other methods being used to communicate an employee's value?
- How are mistakes currently addressed in the firm?
- What training and support methods are in place to counteract poor work performance?
- What methods are in place to communicate appreciation and employee value to the firm?
- How is constructive feedback incorporated into the firm's quality control mechanism?
- How are employees encouraged to provide feedback to employers?