FREE SHORT COURSE WORKBOOK

Introduction to Operational Leadership

Use this workbook alongside the four lessons. Work in pencil or pen on a printout. Use your own team and your own workplace where you can. Numbers shown as examples are examples only.

Name: _____ Date: _____

LESSON 1

My week as a team leader

Think about a normal week. List the tasks that fill your time. Mark each one: do I do it myself, or does my team do it? Then decide which tasks you should hand over or stop doing.

Task	I do it / team does it	Hours per week	Should it change? How?
Example: checking the load list	*I do it*	*3*	*Keep. This is my job.*

Which task do I still do mainly because I am good at it?

_____

_____

_____

LESSON 2

Plan my next shift

Before your next shift, fill in this plan. Do the first part before the team arrives, then use the second part to note what you find as you walk the floor.

Before the shift

Work to be done today: _____

Who is at work: _____ Who is absent: _____

What changed since yesterday: _____

Do I have enough people for the work? Y / N If not, I will tell: _____

Time of walk	What I saw	What I fixed at once	What I need to follow up
Example: 10:00	*Aisle blocked by empty pallets*	*Moved them with the team*	*Ask who stacks pallets there*

LESSON 3

Write clear instructions

Choose three tasks you gave your team recently. For each, write the instruction as you gave it, then rewrite it so that it says what, how well and by when.

The instruction as I gave it	What must be done	How well	By when
Example: Tidy the dispatch area	*Clear empty pallets to the yard*	*Aisles open, floor clear*	*Before 12:00 truck*

Next time, how will I check that the person understood, without asking 'Do you understand?'

_____

_____

_____

LESSON 4

Prepare a conversation and a report

Think of one team member where a short, early conversation about their work would help, or whose good work you want to recognise. Fill in the plan. Then write a draft daily report for today.

Conversation plan

Who: _____ Where and when: _____

The facts I saw (dates and examples): _____

_____

The question I will ask: _____

The one step and date I will propose: _____

Draft daily report

Done: _____

Not done, and why: _____

Problems, and what I need: _____

Plan for tomorrow: _____

My three actions

Write three things you will do differently as a team leader after this course.

1. _____

2. _____

3. _____