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Standards

INVESTORS IN PEOPLE ASSESSMENT REPORT

For

Morning Data Limited

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DATE: 6th August 2008



INVESTORS IN PEOPLE

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1. OUTCOME

Morning Data Limited fully meets the requirements of the Investors in People Standard. I am pleased to confirm that there are no actions required to meet the Standard, following this successful assessment visit.

2. STRENGTHS AND AREAS OF GOOD PRACTICE

The enthusiasm, energy and approachability of the managing director has been a great asset to the business – especially during the growth of the company over the most recent years.

Team lunches on Monday to Thursday provide for an ongoing platform for group discussion in a semi-informal environment as well as cementing the team as a unit.

There is an open and two way approach to training and development requirements. People feel very comfortable asking for development and opening discussions around training needs. At the same time, managers take a proactive view of training and will make development recommendations to people to further their technical and business skills.

A culture of opportunity is encouraged and nurtured where people feel comfortable asking for and taking responsibility for new tasks and appreciate the empowerment that is given to them. At the same time, the organisation provides support for new activities and learning. Within the framework, people are happy to contribute ideas to improve businesses output and efficiency.

3. FEEDBACK AGAINST AGREED OBJECTIVES

This visit was conducted in accordance with the agreed Plan.

The agreed objectives were:

- To confirm that Morning Data Limited meets the requirements of the Standard for recognition as an Investor in People.
- To provide feedback on opportunities for further improvement and continuous development.
- To review the status of the company both through the eyes of the company staff and the tangible evidence in place of appropriate and relevant activities.

Specific information on these points can be found on the continuing pages.

- To ascertain to what extent Morning Data Limited knows about Train to Gain / Skills for Life and if they would like any further information.

The team have now attended several Train To Gain courses focussing on non-technical business skills. These were aligned comfortably with their IIP activity. The organisation has ongoing links with the training provider, CRISP, and more training is planned.

4. POTENTIAL FOR FURTHER DEVELOPMENT

Better definition of staff roles

The staff have basic details of their roles written within their contracts. As their roles have developed and changed in some cases, it might be worth re-visiting the descriptions of the roles and defining them in written form.

This might be especially useful in the case of the top managers and managers so that the structure of the organisation and responsibilities are clearly defined. It was observed for instance, that the managing director performs both manager and top manager roles.

Refining the Business Plan

The business plan was very broad and contained action points as well as some basic KPIs. The plan could be refined to drill down into the measurable objectives and lift out more detailed KPIs.

At the same time, some of the action points would benefit from underpinning with detailed action plans, linked to measurable objectives and back to KPIs. This will improve the business plan for use as a strategic and operational management tool.

Refine appraisal forms

The appraisal forms made for an excellent platform for discussion between people and managers. They could however, be refined a further to take into account the differences in the requirements of individual roles within the organisation. This should apply to the management roles as well as the people roles.

The refined appraisal forms will enable more focussed discussion around the needs of the role and the individual.

More quantitative measurement of outcomes in the evaluation of training and development activity

When developing the strategy for training and development consider setting specific measurable objectives with KPIs and link them back into business plan. This could provide for a structure and yard stick against which other targets could be set and actions aligned.

Consider further opportunities for gathering of information during lunchtime and other regular meetings

The daily team lunches and other regular meetings that are already being undertaken are an excellent means of gelling the team and maintaining open lines of communication. Consider what topics are raised in the meetings and how they are raised, and how the opportunity

might be explored to capture more feedback and ideas, especially to inform strategies and business planning.

Consider the possibility of using the extended Investors in People Standard ('Profile') for your next review as it provides a wider ranging framework of good practice. Profile uses the Investors in People Standard as a foundation, but also embraces a wide range of people management issues which are not contained in the Standard itself (the current Investor in People Standard forms level 1 of Profile which includes levels 1-4). Profile can be used simply as a framework and a tool to help drive continuous improvement; however you may also choose to be assessed against it. As well as providing detailed feedback this could offer you an opportunity to benchmark your performance across the range of people management and development activities by comparing your organisation's achievement to averages for other employers. www.investorsinpeople.co.uk provides guidance on working with Profile including case studies and a free Profile Self Check online tool.

Our Investors in People **Networking Club** provides the opportunity to meet other organisations in your area to share experiences and ideas and improve your business knowledge. Visit our website at www.qualitysouthwest.co.uk to find out more and book your place. These events are free.

Check if any of the **Health & Safety** information available on the HSE website could be useful in maintaining both your compliance and staff awareness. Your Health & Safety Representative might consider if there are any issues that should be addressed: www.hse.gov.uk.

For general **business advice and employment legislation**, incorporating DTI 'best practice', the following website might be useful: www.businesslink.gov.uk/.

With regard to **Leadership and Management**, visit the Institute of Leadership and Management at <http://i-l-m.com>. www.ashridge.org.uk/ includes access to some interesting reports as well as E-Learning resources, whilst www.leadershipsouthwest.com/ will provide you with lots of information from a more local source.

If you would like further advice tailored to your own particular circumstances and needs to assist you in line with the findings of this report, **Quality South West's Advisory Service** will be more than happy to assist. For further information please visit www.qualitysouthwest.co.uk/advice or ring the Advisory Services Manager on 01452 420913 for details of our service packages.

5. CONTINUOUS IMPROVEMENT PLAN

The first column of this Plan has been completed for you as a basis for moving your organisation forward.

Suggestions for further development	Action agreed	Responsibility	Date
Better definition of staff roles			
Refining the Business Plan			
Refine appraisal forms			
More quantitative measurement of outcomes in the evaluation of training and development activity			
Consider further opportunities for gathering of information during lunchtime and other regular meetings			

Date for your next Investors in People Review: Before 27th August 2011.

6. FINDINGS AGAINST EACH PRINCIPLE OF THE STANDARD

An Investor in People develops effective strategies to improve the performance of the organisation through its people.

Morning Data is a small organisation. The managing director fulfils manager and top manager roles.

Indicator 1

A business plan is in place. Targets have been established to include growth in turnover and bringing in new business.

People understand the importance of the key issues facing the business and what must be achieved looking forward.

"We need to bring in at least two new clients this year. Smallish ones."

"The next steps for us are to build our base of smaller clients."

"The business plan has helped us to identify the sort of new clients we should be looking for."

The company holds formal monthly meetings as well as sharing informal lunch meetings with all employees. The feedback from these are used by top managers in helping to formulate strategy for the business.

"We now have monthly meetings where we share financial and business information with the whole team. We need everyone to be involved and understand what is going on inside and outside."

"We can get very stuck into our work at times, but we are kept aware of where the business is heading."

Indicator 2

Morning Data's business is situated in the commercial IT sector. Technology changes quickly and updates in processes are very frequent and sometimes intensive. This is recognised by everyone in the organisation.

Top managers include the time required for training and development in order to maintain the required level of technical knowledge for Morning Data to remain a competitive entity in the marketplace.

It is recognised by top managers that it is very hard to recruit new team members with the exact skills required by the business. It is expected that employees will need to receive regular and ongoing training and development in order to function effectively as part of the organisation.

"In a business as technical as ours, we have to keep up with latest developments. We identify gaps in knowledge very quickly and decide upon the best resources to deal with them."

"We know that we are always going to need to invest in learning resources. Such is the nature of the industry. Often it's an investment of time."

There is a thriving culture of ongoing learning within the organisation. Managers will approach people with suggestions for further training and development. Similarly, it is welcomed for people to approach managers with their requirements for training and development – this is often driven by the arrival of a new technical process or project.

"We have explored various technical training packages to help us use the new operating system. Some are very expensive. We often use online learning which is much more economical, but also allows people to develop in their own way."

"Learning how to use the software was built into our objectives. It is making a difference to them as they are now able to concentrate on other things (driving the business)."

Morning Data are well-practiced in sourcing technical learning for their team. As the business has grown in very recent years, the gaps in the personal business and working skills of all individuals are being realised. Training and reviews on issues such as time management and delegation skills are some of the key areas that the top managers have put plans in place to address.

"We are aware of each other's skill sets. This is a very technical business and one of our key challenges is to ensure that if one person was to hit by a bus tomorrow, another of the team would be able to continue to carry the torch."

"A couple of us have been on a time management course. It has made a big difference in helping us get through busy work periods."

Morning Data might have the option to purchase more of the building that they currently work in. They would like to use the extra facilities as training rooms.

Indicator 3

Morning Data has a very inclusive culture where ideas, workload and projects are shared and discussed openly amongst the whole team. Input from all team members is welcomed by all and taken seriously by managers and top managers.

There are both formal and informal methods of promoting equal opportunities for the entire team. Two-way annual appraisals (with 6 month reviews), regular monthly team meetings, team lunches and the distribution of new projects are some of the methods by which individuals' needs and wishes for development are brought into view in (where appropriate) a transparent environment.

"We have asked staff to tell us what sort of questions they would like to see in their appraisals."

"We want the whole team to feel they are important in the business. When we win a new piece of business, we often pay out a bonus - to everyone in the company, not just the 'sales' people."

"I always feel comfortable asking for training. She listens when we come to her to discuss personal development."

"When a new piece of work comes in we often hand it to the person who's skillset would service the job best, but if someone particularly wants to try something new (and we're not really stretched) we let them take the job on and work with them to see the project through."

"Just before our appraisals, we fill out a form on ourselves. We make comments about our managers too. These are all reviewed when we sit down for the appraisals with our managers."

"In my appraisal I can set targets with my manager for what I would like to achieve over the coming year."

"In team meetings, I do my best to bring people into the discussion to make sure that everyone's views are heard."

Indicator 4

Morning Data is led by a very energetic managing director. There is a great deal of management by walking about and team members come into direct contact with her regularly on a daily basis.

The management team confirm that the qualities required by their managers are openness and approachability, ability to delegate, leadership and support when developing other people, making best use of time and resources and an analytical approach to business activity to avoid pitfalls and address issues that might arise.

"She has tons of energy and enthusiasm and she is always approachable. I can ask her about any issue and I know that she will listen to what I have to say."

"She has bags of patience. Even when things are really busy and hectic, she still takes time to help me with queries."

The technical directors understand their role in providing technical and personal guidance as and when required.

"I can tell when they are having a tough time with the workload. I make a point of taking time to step aside with them to see how we can split the workload or prioritise things."

One member of the technical team in particular has been chosen to be developed as a manager for both his technical and interpersonal skills. He is being mentored and guided by senior managers and time and training resources have been allocated to develop his skills within the framework of the business.

"I am looking forward to attending a course on delegation (as discussed in my appraisal). I can see how it will be useful in the future."

"We have a very capable team of technical people here. We know that we need to concentrate on developing our business management skills. We are going on a delegation course."

"They know their limits and aren't afraid to look for help when they need it."

An Investor in People takes effective action to improve the performance of the organisation through its people.

Indicator 5

The very open culture at Morning Data provides for a lot of two-way communication and feedback. Managers and top managers were able to give examples of where they had recognised issues or opportunities with team members and worked with them to define the best way forward.

People described their managers as effective, borne by their work on identifying areas for development and defining routes to undertake and monitor the development activities.

"I sit down with him every Monday to review projects. We look at Milestones and talk about the best way forward."

"I was aware that there could be some potential issues brought about by the difference in working culture between their last workplace and this one. This would need to be monitored and our own culture integrated over a period of time."

"I know when I have reached the limited of what I can do, but I know who I can go to for advice."

"We have annual appraisals and review meetings every 6 months."

"We work very closely together. We check our progress against each other on a daily basis."

Indicator 6

The organisation recognises that their business type means that the skills and contribution of their team are vital just to the growth of the company, but also simply its continuation.

Financial bonuses are paid out to the whole team when the company makes new business wins or succeeds particularly well in a project.

Through the lunchtime meetings and personal appraisals and daily work-based contact, ideas and input from all team members is gathered in. Errors are recognised as points for development, whilst contributions that lead to successful results are openly acknowledged.

Morning Data also has its own 'L.U.S.T.' awards for saving on business running costs. Certificates and praise are given to team members who suggest these improvements.

"When a new piece of software comes in, we review it as a team. We need everyone's input".

"It was good to be able to do the new piece of work. It stretched me a lot, but I enjoyed it and felt very valued."

"He wanted to take on the new piece of work. It worked out very well. We'll give him more similar work in the future."

"The LUST awards are given out to anyone who introduces a cost-saving method to the company."

Indicator 7

People are empowered to take on projects and responsibilities. People are aware of the implications of their undertakings and will seek the support of managers where necessary.

Several instances were given where people recognised the significance of their responsibilities including client contact/working with clients, ownership of team projects and also how their activities aligned against the company strategies in the business plan.

"We have meetings every week. I can suggest new projects or developments to existing ones to my manager. He often agrees to let me work on these. I can just get on with it, but I know that there is support when I need it."

"They definitely encourage suggestions."

"We Split out the new jobs that come in from clients on the URM system. Who gets them might be based upon each of our workloads or if we have done the job before. Once we take ownership of the project we are empowered to run with it."

"One of my appraisal goals was to get to grips with a new software package. I had to have some training on it, but was given plenty of opportunity to practice. I do sometimes make mistakes, but [my manager] works through them with me."

Indicator 8

Managers were able to provide instances of when they had formally and informally reviewed a person's learning and development progress. Annual appraisals and 6 month reviews form the backbone of this activity, but are reinforced and in reality, activated, by on the job monitoring on a daily basis in the workplace.

"I can tell if they appear to be struggling with something. We simply talk about and decide what sort of development needs to take place."

"Time management training has been very useful. The impact has been felt already. We are now talking about doing some more training on business skills."

"The training hit the areas I needed to improve my knowledge and I was able to use what I learnt straight away. It has taken a load off of [my manager]. I had done similar tasks before, but now I feel a lot more confident and I know that it is making a difference."

There were no induction questions as there have been no new starters to the organisation for over 1 year.

An Investor in People can demonstrate the impact of its investment in people on the performance of the organisation.

Indicator 9

Top managers were able to describe the learning and development activities that had taken place and those that were planned to arise in the future. This included details of costs, time and persons involved and what they expected the individuals and organisation to get from it.

Several instances were provided of where adopting certain training and development methods had provided a better platform for learning as well as cost and efficiency savings. **Examples**

Top managers demonstrated how reflection and planning around the personal development requirements of its people has influenced the business plan. The actions and objectives therein were derived from review of previous and current development and also planned development and its impact upon the business (upon successful completion).

"Learning how to use the software package was built into my objectives on my request. It is making a difference to them as they are now able to concentrate on other things (driving the business)."

"We are getting constructive feedback on a regular basis. I feel confident that I am heading in the right direction with tasks."

"Appraisal methods have come a long way. They have changed [for the better] beyond all recognition over the past two years. The openness has made a difference to how we think and how we work."

"We are getting better all the time at identifying what we need to do to undertake and manage a task. We review how the work has gone (in some cases) and it's helped us to improve how we do next time it comes around."

Indicator 10

Top managers have shown how they have used ongoing reviews of training and development of the team to good effect. This has informed the planning behind part of the business plan and the development of action points and targets to be achieved.

It has also helped the business to identify that there is not enough of a skills crossover in some areas of the business. They are now working to seal these gaps where possible through skills transfer and on the job development for people and managers. This is improving the integrity of the working structure (against loss if a member of staff is removed from the business) but also adding to the effectiveness of individuals in their roles, enabling more efficiency in projects.

Managers were able to describe how they had used recently developed appraisal forms to identify some of the key strengths and areas for development in their team and tasks and that these were forming the basis of ongoing development of the team.

The managing director has been working with the team to help develop monitoring and planning skills and also the people processes within the organisation. The new appraisal system was mentioned by several people as providing an improved and fairer means of measuring their own performance as well as offering enhanced opportunities for feedback.

"We are looking at a constant process of skills transfer to make sure that we don't lose out if we lose a member of the team."

"One of the greatest things that has come out of the past two years is the transparency".

"Developing Phil as a new manager has made us all think about our roles and how we might be able to improve what we do."