

Desk/Field Reviews

Purpose

A desk review is an informal technique used by managers to check how a team member is coping with their work, what challenges they are facing and what support may be needed. It enables the manager to tailor their management style and support to the needs of the team member. This improves motivation, performance, morale and job satisfaction.

How to do it

Wherever possible the desk review should take place at the team members desk. If they work in the field find somewhere suitable, where they can feel comfortable to talk about their work.

Allocate time – usually up to half an hour, but sometimes longer if there are difficult or sensitive issues to be discussed.

Ask the team member to discuss their work with you and what challenges they are facing in achieving their goals or completing their workload. Ensure that they know this is not an evaluation process, but an informal support process entirely focused on helping them.

Ask questions and explore any of the challenges that they feel are likely to cause them difficulty in achieving their goals or workload.

Discuss with them any options that they feel can be pursued to help them deal with particular challenges or problems. Help them find solutions, but be careful not to stifle their own enthusiasm and ownership by prescribing “quick fixes” or dismissing their ideas.

Listen out for and be aware of any personal issues that may be impacting on the team member and explore any additional support needed. Make sure you can deliver anything you promise.

Focus your efforts on the needs of the team member so that you can help guide, motivate and engage them in maximising both their performance and their job satisfaction.

When to use it

Regularly – these are a key part of everyday leadership and really make a difference to the way people feel about their work. Monthly is ideal.