



# TASK NAVIGATOR™

## TASK IN AN ORGANIZATION METHODOLOGY & TOOL

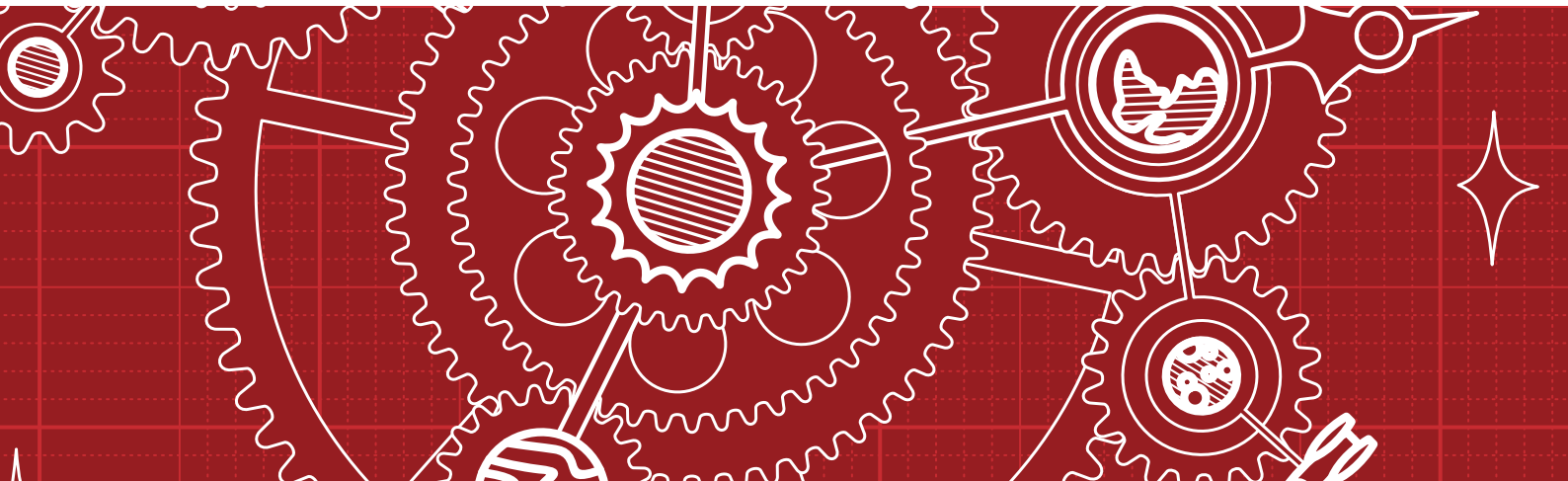
- **KEEP ALL TASK-RELATED JOB DESCRIPTIONS UP-TO-DATE**
- MANAGE** THE STEP-BY-STEP 360° PERFORMANCE EVALUATION PROCESS
- OPTIMIZE** PERFORMANCE AND MAXIMIZE EFFECTIVENESS IN INDIVIDUALS AND TEAMS

Start › Participants › Licenses › Task lists › **Performance** › End

Comments › Reports › Assessors › Action › Monitoring

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Tasks › Invitations › Action › Monitoring



# What are your people really doing?

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**You're very busy.** Chances are, everybody in your firm is very busy, too. New tasks arise, but today's don't just fade away. Some tasks are performed promptly and efficiently, while others are constantly shifted to the back burner. And worse yet, there are tasks serving little or no useful purpose at all. Research shows that in some offices, up to 85% of working time is spent on unnecessary tasks!

**Human resources management** is the delegation of tasks and assigning and enforcing staff accountability for their completion. With the constant inflow of matters requiring their attention, it can be difficult for managers to allocate employees' energy and time for optimal efficiency, and to meet the organization's most pressing needs.

Task Navigator™ from Advisio is an exceptionally intuitive tool – easy to implement and, using its **two automated processes**, invaluable in restoring the optimal distribution of time and energy in task-oriented teams. **Task Navigator™** continually updates the scope of employees' tasks and moderates the periodic **evaluation of the effectiveness** of their work.



## Two Key Processes

The **Task Navigator™** tool employs two fully automated processes enabling effective human resources management in organizations and task-oriented teams of any size.

### Updating individual scopes of tasks

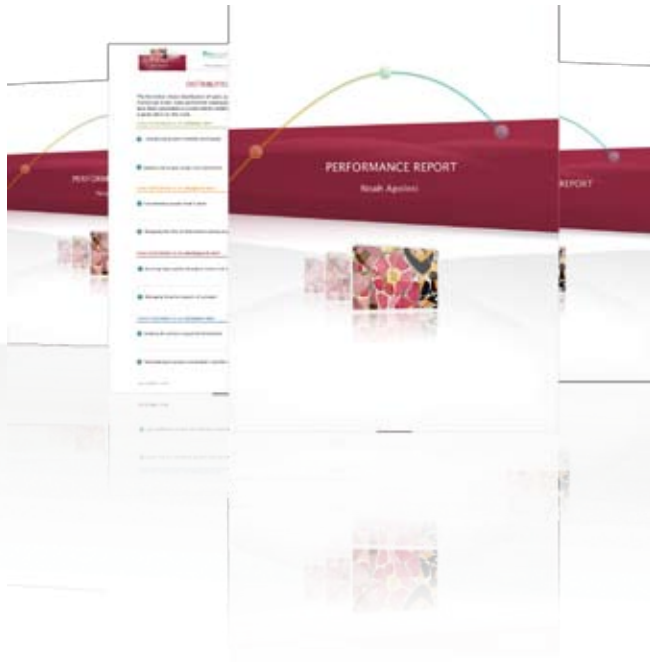
Using online forms distributed electronically, Task Navigator™ polls employees to create lists of the tasks currently in work. The lists are submitted for approval or alteration by their superiors. Once approved, the tool generates concise, grasp-at-a-glance PDF documents, providing a quick, accurate resource for reviewing the scope of all employee tasks.

### The 360-degree performance evaluation

Based on individual employees' current task lists, Task Navigator™ generates online 360° evaluation questionnaires allowing the effectiveness and performance of each individual employee involved in a given task to be evaluated by all others involved in or affected by the task. Evaluations come not only from superiors, colleagues and subordinates, but also – where appropriate – from internal and/or external clients, partners and suppliers. The result of this process is a comprehensive set of individual and group reports allowing optimization of work effectiveness in the organization.

## Task Navigator™ Reports

Each use of the Task Navigator™ tool generates three types of uniquely valuable, immediately useful reports. A current list of tasks assigned to each employee, Task Navigator™ individual reports, and Task Navigator™ group reports.



### The most important information in a nutshell

Task Navigator™ provides the most important information in concise yet comprehensive, highly usable reports, with the most important points spotlighted in graphic form on a single page.

### Picture from various perspectives

Respondents' opinions of the work of an individual being evaluated often vary widely. To help keep a balanced perspective, the Task Navigator™ report presents a picture of employee task performance from four different points of view: that of superiors, of subordinates, of co-workers, and of partners and clients.

### Evaluation by associates vs. self-evaluation

The report also compares each employee's self evaluation with the assessments of performance made by those working with the evaluated person. This comparison is often a key element in participants' development of self-awareness, self-discipline and self-leadership.

### Highlighting differences in perspectives

Numerical averaging of answers can kill important information. Task Navigator™ reports present evaluation findings in a visual, "sensory" way that facilitates not only a strictly statistical interpretation, but also allows for the critical tempering qualities of imagination and intuition. It assures that managers are able to see how differences in opinion – arising from varying needs and points of view – affect evaluations, and it provides the latitude necessary to adjust to or compensate for them.

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### **Anonymous comments**

Thanks to open-ended questions and the anonymity of respondents, the Task Navigator™ process actually provides those being evaluated with a great deal of constructive feedback from co-workers. This feedback is presented in a meaningful context in individual reports, with quoted material directly associated with the scale to which it relates.

### **Real feedback instead of labels**

The Task Navigator™ provides feedback in an inclusive and encouraging way – opening doors, rather than slamming them closed. An important objective and key feature of the individual reports is to minimize the resistance of those being evaluated to change in favor of greater effectiveness. For this reason, reports avoid definitive judgments, labels and potentially harmful stereotyping.

### **Finding the cracks that effectiveness falls through**

Some tasks get scratched off as “done” without ever coming close to acceptable levels of accuracy, efficiency or quality. For those responsible for development of human potential in the firm, one of the most important features of Task Navigator™ reports is their ability to red-flag tasks performed inadequately. Even single instances of under-performance can spotlight areas in need of immediate attention.

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### **Warnings preventing wastage**

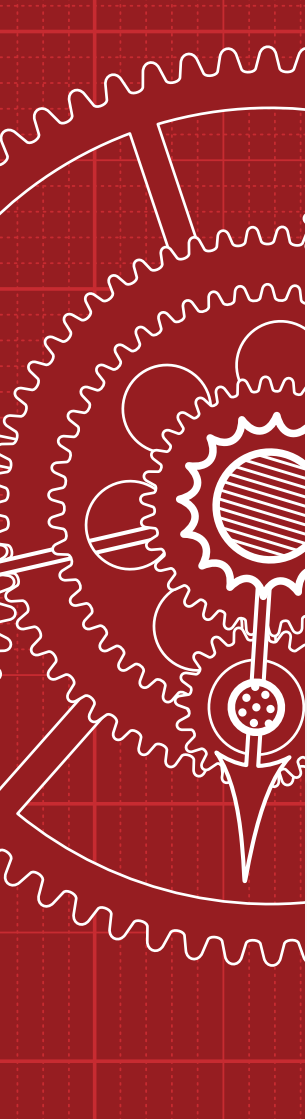
Perhaps surprisingly, over-performance can also be a drain on resources. It's possible to go too far in the performance of some tasks, and the structure of Task Navigator™ reports helps prevent costly wasted time and energy of employees paying too much attention to matters of little importance.

### **No limit on the number of group reports**

Task Navigator™ is designed specifically to help optimize task-oriented performance in literally any organizational structure. By placing no limitations on the number or make-up of group reports, it's possible to view as many structural cross-sections as necessary – including in-project, sub-group, parent and network organizations – to compose a complete analytical picture.

### **Information ecology**

Clearly, from the commercial point of view, the only good information is relevant information. The same is true from the efficiency perspective. Irrelevant, unnecessary information litters the organizational environment no less than the wasted toner and paper used to print it. Task Navigator™ reports have been designed to be “green” – with an organizations' information ecology in mind.



# Continuous improvement of performance

While it's not always obvious on the surface, virtually all tasks performed in an organization are interrelated. Employees are generally considered accountable to direct superiors for their performance, but their performance resonates across a vastly wider area. Effectiveness, accuracy and timely completion of work of each person in an organization can not only affect the internal and external image of the organization, it is literally a prerequisite for quality work among an untold number of colleagues, superiors, subordinates, internal clients, partners and subcontractors.

With this far-reaching network of stakeholders in the work of individual employees, performance optimization relies heavily on open, constructive dialogue among all concerned. Task Navigator™ finds and moderates the various streams of information exchange in employee teams in a way that allows **precise, comprehensible, constructive feedback** to be passed on.

Intensive, bilateral communication and precise feedback between individuals whose performance is interrelated is invariably a hallmark of all **really good teams**. It is one of the most effective incentive influencing employee performance.

## The Advisio Contextual Scale™

The Advisio Contextual Scale™ is a means of obtaining consistently clear, precise, relevant feedback by assuring that performance assessments are framed in the context of specific tasks in specific organizational situations.



### Coaching structure

Task Navigator™ questionnaires ask supervisors, colleagues and other stakeholders in a given task to indicate whether or not the employee being evaluated performs it adequately. The question is posed in this way to assure that the evaluation relates to completing actual tasks in a specific, real-world context, and to avoid any tendency to judge an employee's performance against some intangible, abstract ideal.

### The organization's perspective

By providing answers on the Contextual Scale™, each respondent is allowed to, in effect, sit for a while in the managing director's chair and look at the work of the evaluated employee from the perspective of the organization's needs, and to have that point of view reflected clearly in the responses on the scale.

### Adequacy is most important

The Contextual Scale™ provides a not-so-subtle reminder that more is not necessarily better. In business, excess means wasted energy, potential and talent, and lost time and money. The Contextual Scale™ is invaluable in helping to eliminate the waste and prevent the losses.

The Contextual Scale™ focuses on the most important objective in the evaluation of effectiveness of work on tasks in a commercial context: determining the level of compatibility of employees' performance with the organization's needs.

### **Natural communication**

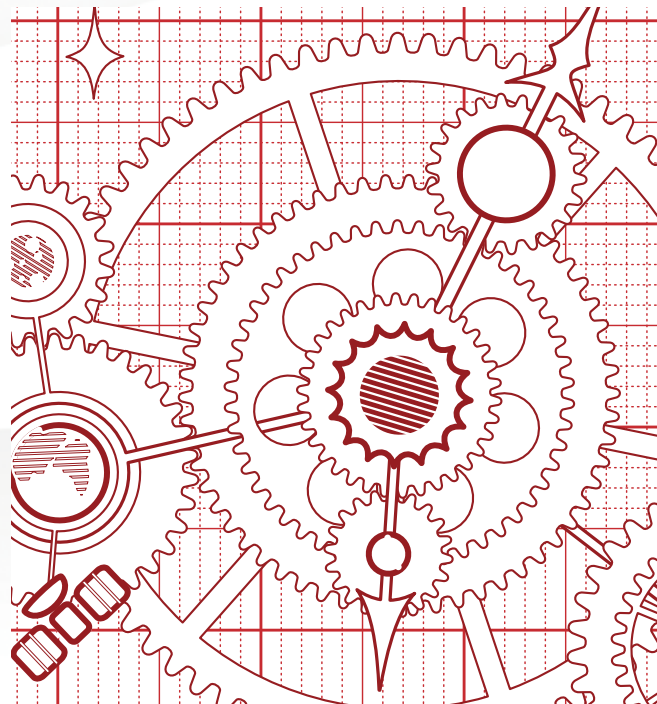
The structure of the Contextual Scale™ also makes completing Task Navigator™ questionnaires simple and stress-free. Employees, managers and other respondents find giving answers as natural as having an informal chat over coffee. The wording is unpretentious, the language understandable and meanings clear.

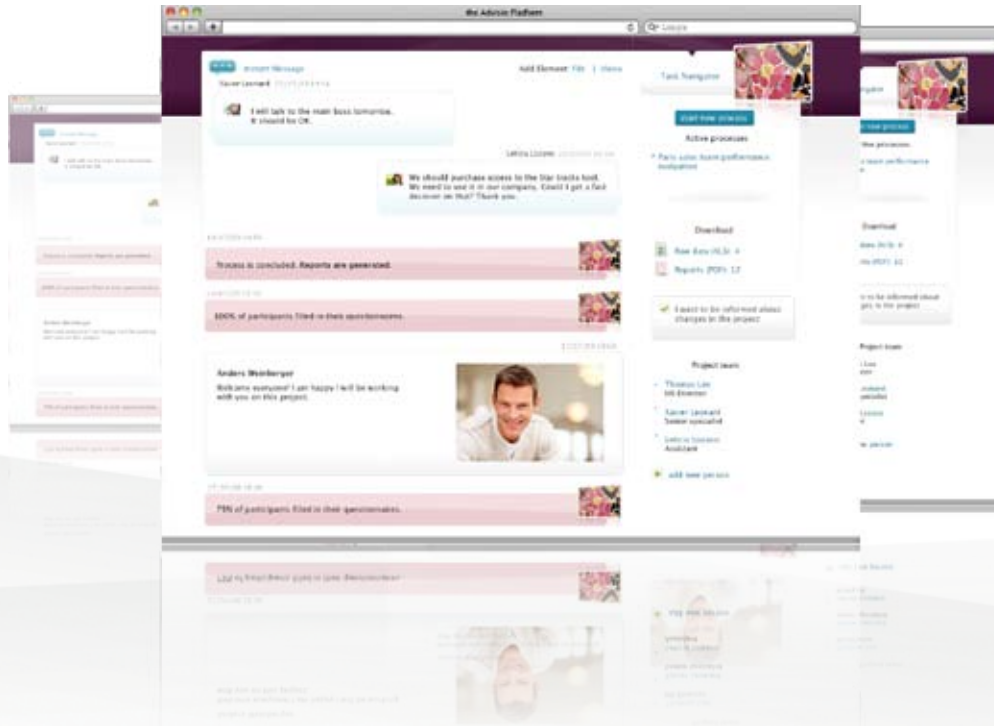
### **Open, but specific**

Open questions mean that there are no limits to what can be said – opinions can be expressed fully, reasoning can be explained, and specific observations, impressions and interpretations can be included. And because the questionnaires allow specific, open coaching questions to be chosen that suit the context precisely, a great deal of valuable feedback is exchanged freely and naturally among participants.

### **Auto-coaching by self evaluation**

A key element built into the the Task Navigator™ process is employees' evaluation of their own effectiveness. The moment of introspection needed for self-assessment helps to fortify participants' resolve in developing self-leadership skills, self-discipline and personal time- and energy-management.





## 12. ADVISIO Consulting Methodologies The new generation of organizational development tools

# How much time do you have for management?

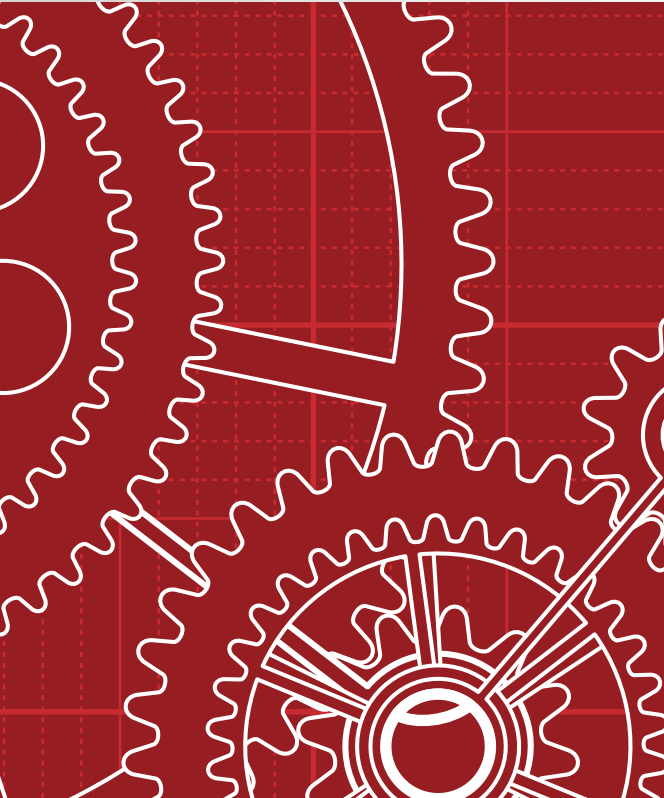
If you have “all the time in the world” to spend on managing a team of people, you probably **don’t need any help** from Task Navigator™. Just agree on every detail of every task with every employee on a regular basis, provide a constant stream of constructive feedback, and make sure every team member does the same with every teammate. You’ll have an ideal team whose work effectiveness increases steadily.

If, on the other hand, your time is somewhat more limited, you’ll appreciate the **discrete assistance** of **Task Navigator™**. It will single-handedly ensure that all important task-related communications are handled in a manner that maximizes effectiveness and virtually guarantees positive results.

The Task Navigator™ tool is a set of online questionnaires and reports leading **every participant step by step** through the entire process: from updating individual task lists, through their adjustment and approval by superiors; from automatic distribution of 360-degree questionnaires, to generation of actionable reports in PDF format.

## The pleasure of controlling a powerful tool

**Task Navigator™** takes the consultant and the project team step-by-step through every stage of the process – from updating of the scope of work on individual tasks and gathering evaluations of employee effectiveness, to creating and using the ideal variety of individual and group reports..



### Get up and running in minutes

Configuration of the Task Navigator™ tool and implementing its uniquely powerful development processes is fully automated – it literally takes only moments.

### Task Navigator™ remembers, so you don't have to

You don't need to remember how the entire process is performed, or even where you are in the process at any given time. As each stage is completed, Task Navigator™ “turns the page” and offers a clear, easy-to-follow “next-steps” action plan. You can conduct dozens of evaluations simultaneously. You will not get confused.

### Everyone is up to date

In the virtual world of cloud computing, the entire project team can work together without the need for in-person meetings or physical proximity. Task Navigator™ looks after communication, documentation and information exchange in the team like a good project manager.

### One task, one hundred, or more...

Task Navigator™ imposes no limitations on the number of an employee's tasks that can be evaluated, nor on the number of individuals being evaluated.

### Many stakeholders

The more opinions gathered regarding an individual's effectiveness of work, the more substantial the evaluation will be, and the more impactful the feedback will be on the person being evaluated. Task Navigator™ places no limitations on the number of people responding to individual assessment questionnaires. A managing director could even be evaluated by all of the firm's employees, suppliers, partners and clients!

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### **Important voices**

It's not only superiors, colleagues and subordinates that know a lot about an employee's performance. Important insights, valuable information and a wider range of informed opinions can be obtained by inviting internal and external clients, partners and suppliers involved in or affected by an employee's task to join in the Task Navigator™ evaluation process.

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### **Freedom of choice**

Depending on context and specific organizational culture, respondents can be allowed to add anonymous comments, or even choose not to respond at all. Task Navigator™ puts these decisions in your hands completely.

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### **A common language between systems**

Task Navigator™ communicates well with other IT systems containing data needed for evaluations. All vital information can be imported and exported safely as Microsoft Excel files.

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### **Connection security**

The Task Navigator™ tool secures and protects processed data the same way electronic banking systems safeguard access to financial information, using strong data encryption and a secure internet connection.

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### **Good relations**

Invitations to complete the questionnaire sent by e-mail are often an element of a broader policy for provision of information within the organization. Task Navigator™ allows you to choose the wording of invitations, and to choose the timing of their distribution so that the announcement of the process itself serves to strengthen the project team's positive relations with evaluation participants.

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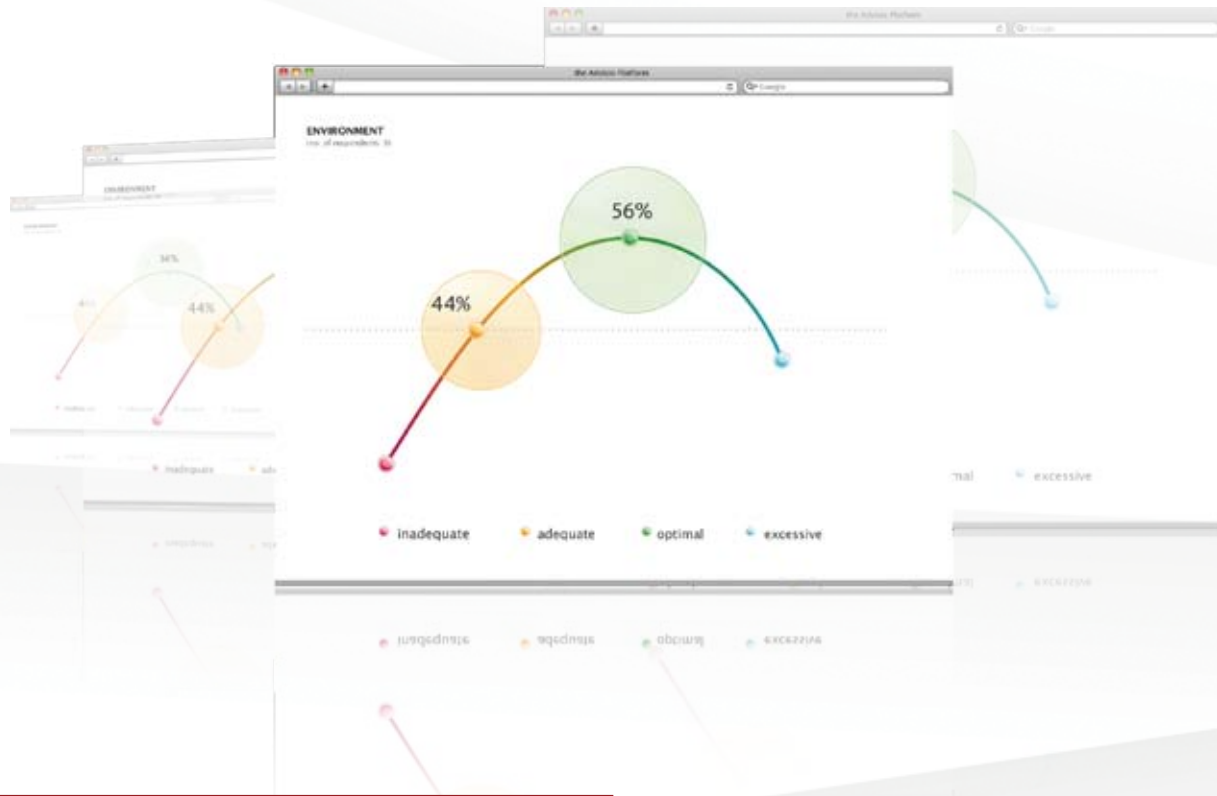
### **Regular progress reports**

Task Navigator™ keeps the project team informed as the process progresses. The consultant managing the process sees the progress in detail as questionnaire responses come in. Other members of the project team are notified when 25, 50, 75 and 100% of expected responses have been received.

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### **The occasional gentle reminder**

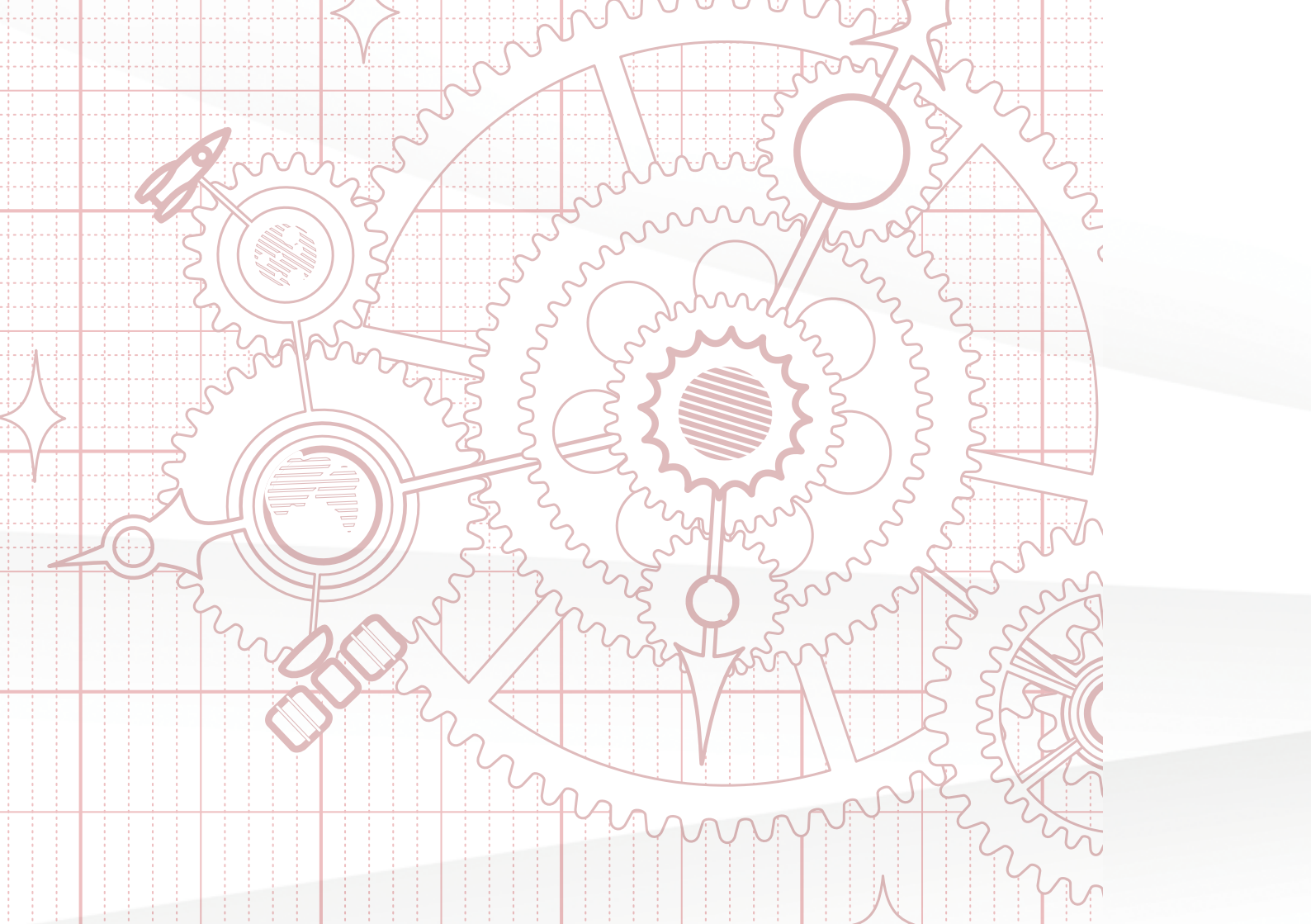
Sometimes schedules, meetings and deadlines get the better of everyone. If any of the invited respondents forget to fill in the questionnaire, Task Navigator™ sends out a discrete reminder politely requesting their responses as soon as possible.



# Stability in change

Mergers, takeovers, restructuring, new projects, new processes, new services. For business in the 21st century, change is an everyday occurrence. For **employees**, change in the scope of tasks, in work organization, or in personnel among close co-workers can trigger unease, uncertainty, stress and even fear.

Employees' fear of change is most often due to lack of information and lack of understanding of the “new rules of the game”. Task Navigator™ can help disseminate accurate information and clarify how the “rules” are or are not changing. As Task Navigator™ facilitates discussions with superiors to agree on the scope of current tasks, and assures regular constructive feedback about the effectiveness and usefulness of their work, employees can retain a **sense of security** in a seemingly unstable environment.



# Use of the Task Navigator™ methodology and tool

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Deployment and use of the Task Navigator™ methodology and tool is strictly limited to consultants certified by Advisio Consulting Methodologies.

Authorized Advisio partners using this proprietary tool in consultancy work display the “Consultants of the Future” logo – a distinction reserved for training and consulting firms that apply Advisio methodologies and tools to give clients a distinct competitive edge in the 21st century economy.

