

Position Matrix Communication System Workshop Handbook

*Defining, documenting and communicating
what people do and how they do it.*

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Additional Resources

Following are additional resources and forms for your reference and use.

[Position Matrix™ form](#)

[Performance Appraisal Form](#)

[Verb List](#)

[Example Completed Position Matrix and](#)

[Position Essentials Worksheet](#)

[Performance Appraisal Forms](#)

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What's In It For Me?

Some questions you may be asking yourself include:

- Why are we taking the time to do this?
- Isn't this just "more paperwork"?
- What's in this for me?
- How is this different from other "systems" we've tried that didn't work?

These are good questions. A natural reaction from employees and managers. Let's start the process of answering these questions with a few more questions.

- Do you always know what you're supposed to do in your role?
- Do you know how you should do it?
- Has anyone else ever claimed credit for your work and ideas?
- Have you ever wondered if you were doing a good job?
- Have you ever had a performance appraisal you felt was unfair?
- Have problems with co-workers' work ever caused problems with how you perform your role?
- Have you ever had a better idea but couldn't get anyone to listen?
- Have you ever wanted to change the way you perform your role?

The Position Matrix™ Communication System is...

An opportunity for you to:

- Take more responsibility in *defining, documenting and communicating* what you do in your role.
- Clearly know what is expected of you.
- Get clear feedback as to how you are doing.
- Initiate clear & objective Performance Appraisals
- Get the training you need to succeed.
- Provide input into how your co-workers perform their roles.
- Be recognized for your ideas and meeting your goals.
- Change the way you perform your role so long as your co-workers and supervisor agree.

A way for Management to:

- Assist employees in improving their productivity.
- Improve the company's productivity.
- Treat employees fairly and objectively.
- Recognize employees when they succeed.

In today's world, all businesses need to change continually in order to remain competitive. If they're not competitive, they're gone and you're out of a job. This is the harsh reality of doing business today.

Challenges and Opportunities

Challenges and opportunities are created by:

- Increasing globalization of business
- Improvements in technology
- Improvements in communication
- Decreasing margins and profits

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To meet these challenges and opportunities businesses must decide:

- What form should changes take?
- How should changes be documented?
- What will work?
- How do we avoid change for the sake of change?
- What impact will it have on long-term productivity?
- Will anyone understand it?

Meeting Challenges and Opportunities

What doesn't work:

- More reports and procedures that don't add value.
- Reorganizations that only change form and consolidate power.
- Endless committee meetings in search of a consensus, plan, or strategy.
- The next great *theory* on how to do things that ignores the *reality* of how people actually do their work.

What does work:

Defining, documenting and communicating what employees do and how they do it with an objective role description.

“Objective” 1: of or relating to an object or end 2: existing outside or independent of the mind 3: *treating or dealing with facts without distortion by personal feelings or prejudices*

(The Merriam-Webster Dictionary)

Elements of an Objective Role Description

- The measurable **goals** of the **supervisor**.
- The measurable **goals** of the **employee**.
- The **activities** the employee will engage in.
- The **tools** and **processes** used by the employee.
- The **level of responsibility**.
- The other **employees impacted** by the position.
- The unique **challenges** of the position.

Your company has decided to use the Position Matrix™ Communication System to develop objective role descriptions.

- The Position Matrix™ is a simple and easy to use, one-page form that *defines, documents, and communicates* all of the elements of an objective role description.
- It starts with you! You do the first draft.
- Who knows your role better than you?

The Position Matrix™ Communication System is an opportunity for you to:

- Define what you do and how you do it.
- Document it so there is a written record of what you do.
- Communicate it to your supervisor and co-workers.
- Be truly empowered.
- Define success for your role

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The Position Matrix™ Communication System is an opportunity for your company to:

- Avoid confusion and contradictory direction.
- Define and clarify success.
- Define how success is to be achieved.
- Promote fairness in management decisions.
- Empower employees.
- Promote teamwork.
- Promote leadership.
- Reduce turnover.

The Position Matrix™ Workshop

Let's take a look at a couple of simple rules before we start.

Rule #1 – Use a pencil. Everyone makes changes as they complete the Position Matrix™.

Rule #2 – Don't get hung up on the writing! This isn't a test! It doesn't make any difference how well or if you can write. A man who could barely read or write used this process to show his supervisor how they could increase production by 20%.

Rule #3 – Focus on what you do now! When creating your Position Matrix™, think about your role in a 6 month time frame. We recommend that you revise your Position Matrix™ at least every 6 months. Some people may not have any changes while some people have major changes as customers, technologies and other factors evolve.

Sections of the Position Matrix™

The Position Matrix™ has 12 parts.

1. Heading
2. Key goal(s) of supervisor
3. Key goal(s) of the position
4. Organizational sketch
5. Macro activities and amount of time spent on each.
6. Expanded activities
7. Tools and processes used
8. Level of responsibility
9. Key impacts
10. Position challenges
11. Signatures
12. Position Essentials Worksheet

To view a sample Position Matrix™, [click here](#). It is suggested that you print this file for your reference while you complete your Position Matrix™.

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Following are step by step instructions to completing a Position Matrix™.

1. Heading

In this section, found at the top of the page, fill in:

- Your name and position title;
- To whom you report using the position title; and,
- The name of your organization and the department, unit, or team to which you belong.

2. Key Goal(s) of Supervisor

Why should you care what your supervisor's goals are? So you can relate your goals to his or her goals. This is the start of good communication and showing how all roles are related. The key goals of your supervisor are the 2 or 3 things that she or he must accomplish in the next 6 to 12 months. If these goals are not accomplished, then your supervisor has not been successful. If you don't know what these goals are, guess! They can always be changed later. Refer to *Tips When Writing Goals* and *Tips to Make Goals Measurable and Objective*, below, when writing your Supervisor goals.

3. Key Goal(s) of This Position

Just as your supervisor has 2 or 3 goals to be accomplished over the next 6 to 12 months, so do you. If you accomplish your goals, your supervisor is more likely to accomplish his or her goals. Refer to *Tips When Writing Goals* and *Tips to Make Goals Measurable and Objective*, below, when writing your Position goals.

Tips When Writing Goals

- All goals should be **measurable** and **objective**.
- Write goals in measurable terms using quantities and specific time frames.
- In other words, "What result?" by "When?"
- If goals can't be measured objectively, how can anyone be fair and objective in a performance appraisal?

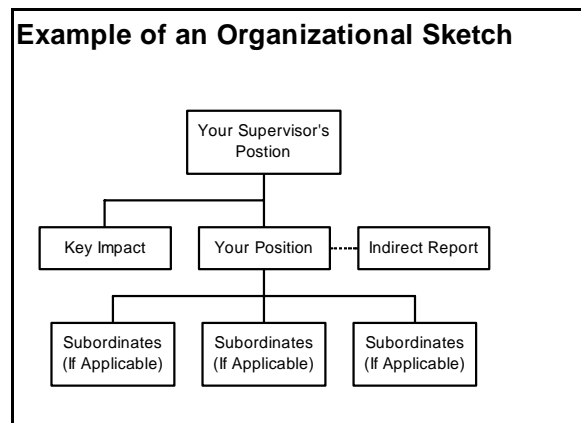
Tips to Make Goals Measurable and Objective	
The Goal . . .	Can be written in measurable and objective form as . . .
Increase sales	Increase sales by 10% by July.
Reduce OSHA violations	Reduce OSHA violations to 5 per year.
Make parts	Produce 100 widgets per hour with zero defects.
Complete weekly reports	Complete weekly reports by 8:00 am on Monday.
Pass out paychecks	Issue all paychecks by noon every Friday.
Make units	Complete units per quantity determined by contract

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0 injuries	Work injury free in coming year.
0 scrap	Cut materials scrap by 5% next month.
Design widget	Complete new widget design by October.
Increase share value	Increase share value 5% next quarter.

4. Organizational Sketch

The section of the Position Matrix™ illustrates how your position fits into the organization. Limit this section to one level above your position, positions at your level and one level below your position.



5. Macro Activities

Use the Macro Activities Section to show what you really do in your role. what you are being paid to do. What do you really do to reach your goals. You should limit the number of Macro Activities to 4 or 5. Consolidate other activities in big groups. Do not list step by step procedures. There is a place for these in the Expanded Activities.

Keep in mind:

- Macro Activities are general statements that allow people to understand what you actually do in your role.
- They are not detailed directions for how to perform the essential functions of the position.
- Short phrases of a verb and a noun (direct object of the verb). Refer to the [Verb List](#) for ideas for verbs. You may want to print the Verb List for continuing reference.

To write your Macro Activities:

- Indicate the priority of your Macro Activities, with 1 being the highest.
- Indicate the percentage of your time spent on each Macro Activity.
- Use 5 percent increments to assign time spent on a macro activity.
- Remember that Macro Activities need to total 100%.

Macro Activity Examples

- Manage accounts receivables
- Fabricate customized parts
- Conduct training session
- Design marketing strategy
- Assemble widgets
- Weld structural frame members
- Sell widgets

6. Expanded Activities

Use this section to show a breakdown of what you do in your role.
The activities that further define each of your Macro Activities.

Keep in mind:

- A rule of thumb is 1 Expanded Activity for each 10% of your total time. (A Macro Activity with 40% of your time would have 4 Expanded Activities)
- Expanded Activities are like the Macro Activities, only with greater detail.
- Don't list tools and processes.

To write your Expanded Activities:

- Write phrases with a verb and a noun. Verbs show the action of the Expanded Activities.
- Refer to the [Verb List](#), if you like and print a copy for your reference while you complete your Position Matrix™.
- Include measurable amounts when possible, "how much by when."

Expanded Activity Example #1

If the Macro Activity is *Complete Payroll* and the time spent is 30%

The Expanded Activities might look like:

- Code sheets on each employee for payroll (hrs., time off, etc.) before sending to parent Co. accounting dept. by 10:00 am Mondays.
- Distribute checks each Friday am.
- Write payroll report monthly and maintain related payroll files (w-4s, I-9s, etc.)

Expanded Activity Example #2

If the Macro Activity is *Wire Boxes* and the time spent is 60%

The Expanded Activities might look like:

- Read blueprint.
- Select proper size box from bin.
- Measure and cut proper length of wire.
- Run wire through box and connect wires.
- Compare completed box to blueprint.
- Forward box to assembly within 20 minutes of receipt.

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7. Tools & Processes

Use this section to show the tools & processes you require to perform your role.

Keep in mind:

- Tools & processes can also include people, departments or vendors that you need for your role.
- By having an accurate list of all the tools & processes you use, your company can use the information to make purchasing decisions, arrange training, provide required safety devices, etc.

To write your Tools & Processes:

- List Tools & Processes for each Macro Activity.
- Attempt to use the common names for Tools & Processes used in your company.

Examples of Tools & Processes

- Weekly management meeting
- Computer
- Automobile
- Drill press
- Impact wrench
- CAD system
- Microsoft Excel
- “Phone, fax and PC”
- Assembly line
- Welder
- Checklists
- Mechanic’s tools
- Sales brochures
- CPAs and attorneys
- Distribution system
- Procedure Manual

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8. Levels of Authority

Use this section to show who is ultimately responsible for completing each of your Macro Activities. Here are the levels of authority from which you may choose. In levels 6 through 1, the authority is sole.

Level 8 - Delegated – you are the supervisor

Level 7 - Take Action - no further contact with supervisor required

Level 6 - Take Action - report action to supervisor

Level 5 - Look into it - report intentions to supervisor (veto authority by supervisor)

Level 4 - Look into it - report intentions to supervisor (direct authority by supervisor)

Level 3 - Look into it - make recommendation to supervisor

Level 2 - Report data to supervisor for decision

Level 1 - Shared - authority is shared with a Key Impact

To write your Level of Responsibility:

- Determine for each Macro Activity your level of responsibility from the 8 levels listed above.
- If the responsibility is Delegated (Level 8) or Shared (Level 7), note to whom (by title) it was delegated or with whom it is shared.

9. Key Impacts

Use this section to show who is directly impacted when you complete each of your Macro Activities.

Keep in mind:

- It is understood that Customers, and Supervisors are impacted when you perform your role and are generally not listed on this form.
- Key impacts can be people or departments in your organization.

To write your Key Impacts:

- Think about the following for each Macro Activity:
 - If you don't perform your role well, who's role is harder?
 - If you do a great job in your role, who's job is easier?
- The people most directly affected or impacted by the completion of each Macro Activity are your Key Impacts.
- To make this process simpler, think of names of your key impacts, but only list their titles on your form.

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Two Examples of How to Determine Key Impacts

#1 An assembly Line.

Bob (Assembly Worker), Mary (Wiring Specialist), and Tom (Finisher) work on an Assembly line. Bob handles the product first, then passes it to Mary who then passes it on to Tom. Bob would list Wiring Specialist as a Key Impact. Mary would list Finisher as her Key Impact. Further, let's say that Tom passes the product to Mark (Quality Manager) or Sue (Quality Assistant) in Quality Assurance for Testing. Since Tom does not know who will test the product, on his Position Matrix™ he can list Quality Department as his Key Impact.

#2 An Administrative Department

Sheila is the Chief Financial Officer. Steve (Production Manager), Joan (Sales Manager), and John (Customer Service Manager) all have an Expanded Activity to prepare budget estimates by the 15th of every month and send them to Sheila by 5 p.m. Steve, Joan, and John would list CFO as a Key Impact for that Activity

Examples of Key Impacts

- Fabricator
- Accountant
- Inside Sales Associate
- Finish Carpenter
- Market Research
- Engineer
- Plumber
- Shift Supervisor

Note the use of Titles and not names when listing Key Impacts.

10. Position Challenges

Use this section to show specific physical, political, economic, or social conditions that will make this position difficult during the next 6 to 12 months.

Keep in mind:

- These challenges should be unique and not a normal part of the position.
- Say what you think! This is part of the communication process.
- Not everyone will have Position Challenges. If items do not “pop” into your head immediately, you may not have any Position Challenges at this time.

To write your Position Challenges:

- Determine specific physical, political, economic, or social conditions that will make this position difficult during the next 6 to 12 months.

Examples of Position Challenges

- A new boss
- Old equipment
- Implementation of new policies and procedures
- A hostile work environment.

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- Lack of freedom to be creative
- Striking workers at a supplier
- Emerging business or market
- Recent reorganization
- New employees, product or service

Use the Position Essential Worksheet to document the physical, mental, and environmental demands of your position.

11. Signatures

- Signature lines for Employee and Supervisor.

12. Position Essential Worksheet

Use the Position Essential Worksheet to document the physical, mental, and environmental demands of your position. [An example of the Position Essentials Worksheet](#) is attached at the end of this document.

This completes the Workshop portion of Completing your Position Matrix™. Place your Position Matrix™ and Position Essential Worksheet back into the envelope and give it to the instructor as you leave.

What Happens Next?

In about one week you will receive an envelope containing the following:

1. A cover letter.
2. The Original Position Matrix™ you completed in the workshop.
3. A word processed version of the Position Matrix™ marked “Proof Version” you completed in the workshop.
4. A “critique” of your Position Matrix™.

The critique is completed by members of the Roster Network facilitator’s staff to help get a clearer view of your role. Items identified by the critique include:

- Statements that are unclear and hard to understand.
- Items that are not in the Position Matrix™ Management System recommended format.
- Items that the word processing personnel could not read.

The critique may offer suggestions to make your Position Matrix™ better represent your role.

You will be asked to review the critique and the word processed Position Matrix™. If you wish to make changes, this is your time to do so. If you do not wish make changes, check the “No Changes” box on the form. Place all the items back into the envelope and return it to the person indicated in the cover letter.

The Roster Network facilitator’s staff will word process any changes indicated and produce a “Key Impact Review” version of your Position Matrix™. The Key Impact Review is the next step in the Position Matrix™ Communication System process.

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The Key Impact Review

To this point in the process a “snapshot” of your company has been taken. You and others in your company have indicated what activities are performed. The Key Impact Review will allow your company to fine tune processes and procedures, and make sure that everyone understands his or her role in the organization.

This process starts at the top of your company. The President/CEO and his or her direct reports will meet and review each Position Matrix™ of those attending. Goals will be agreed upon and Activities may be changed. Next, each person in the first meeting will have similar meetings with his or her direct reports until all the Position Matrices™ in your company have been reviewed.

Each Position Matrix™ will be returned to the Roster Network facilitator for a final word processing. The final word processed Position Matrix™ will be returned to you for your signature and your supervisors signature indicating both have agreed to all of the aspects of the position.

Steps To A Key Impact Review Meeting

- Supervisor notifies all of his/her direct reports of time and place of meeting.
- All Position Matrices™ for the attendees are gathered and a complete set is made for each attendee.
- The Supervisor shares his or her Position Goals with the group and reviews his or her Activities.
- Next, one by one, each attendee's Position Matrix™ will be reviewed with the Supervisor and other attendees asking questions and making recommendations.
- The Supervisor has the final say on any changes made to individual Position Matrices™
- Each attendee is responsible for indicating needed changes on their Position Matrix™.
- Each attendee will turn in an updated Position Matrix™ at the end of the meeting. (If no changes were made check the “No changes” box)
- A final Position Matrix™ version will be produced by the Roster Network facilitator.

Sample Completed Forms

To see a sample completed Position Matrix™ and Performance Appraisal, [click here](#). Please keep in mind every position is different, so do not be alarmed if your Position Matrix™ is substantially different from this example!

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Maintaining Your Position Matrix™

Review your Position Matrix™. . .

- Every 6 months.
- Every time your role changes and it no longer describes your role.
- To see if you're doing what you're supposed to do the way you're supposed to do it.
- To evaluate your own performance on a regular basis. Are you meeting your goals?

Revise your Position Matrix™ . . .

- When your role changes.
- If you have a better idea on how to perform your role.

. . . and have your Key Impacts and Your Supervisor review and approve the changes.

What's in this for me? Part 2

In the introduction to this handbook, "What's in this for me? Part 1," we answered some questions about how the Position Matrix™ Management System creates opportunities for you in your position. Included in these opportunities are the following:

- Take more responsibility in *defining, documenting* and *communicating* what you do in your role.
- Clearly know what is expected of you.
- Get clear feedback as to how you are doing.
- Initiate clear and objective Performance Appraisals
- Get the training you need to succeed.
- Provide input into how your co-workers perform their roles.
- Be recognized for your ideas and meeting your goals.
- Change the way you perform your role so long as your co-workers and supervisor agree.

Through the workshop and review process, you will have completed a Position Matrix™ for your position and it will have been reviewed and approved by your key impacts and supervisor. In this section, we'll take a closer look at how the Position Matrix™ Management System can help you achieve personal success and success for your employer.

Performance Appraisals

One of the greatest benefits of the Position Matrix™ Management System is the ability to do clear, fair and objective performance appraisals. If you have ever had a performance appraisal that you did not feel was clear, fair and objective, you can appreciate the need for a good performance appraisal process.

One of the many reasons employers have trouble with performance appraisals is that they do not have role descriptions that identify what people actually do in their roles and how they do it. Too often, job or role descriptions are vaguely couched in terms of “responsibilities” and “accountabilities” without answering fundamental and basic questions about what people do in their roles. What are their goals? What activities do they perform? What tools and processes do they use? Who do they impact? If the role is not clearly defined, how can a supervisor review a person’s performance in the role? If you don’t know exactly what you are supposed to do in your role, how do you know if you are doing a good job in performing your role? How does your supervisor know if you are doing a good job?

The Position Matrix™ provides an answer to these questions by creating a role description that defines, documents and communicates what you should do in your role. The next step is to review your performance in your role.

- Performance Appraisals should be done:
 - At least every 6 months, starting with the first 6 months after the date your Position Matrix™ was approved by your supervisor;
 - If you are not meeting your goals or the needs of a Key Impact; or,
 - If you have determined that there is a way to improve how you perform your role.
- Start with a “self-appraisal” with the [Performance Appraisal form](#). You may also obtain copies of the forms from your supervisor. Some employers may have them available as a template on computer networks.
- Rate the level of your performance from 5 (best) to 1 (worst) for each Macro Activity on your Position Matrix™. Be fair and candid! If you are not performing well, this is the time to call it to the attention of your key impacts and supervisor so they can help you improve your performance! The Performance Appraisal process is designed to improve performance and not to find fault or place blame! There is plenty of room on the form for your comments as to why you are performing well or not so well. If you need more room, attach a blank sheet of paper. Examples of comments regarding poor performance would include a key impact not getting work done, inadequate training, a new process or changes in the role. Again, the purpose of the process is to find problems and fix them.
- When you have completed the self-appraisal, submit the form to your key impacts for them to make comments. You may need to make copies if there are several key impacts. Each key impact should only address the Macro Activity(ies) that has an impact on his or her work.
- After they key impacts have made their comments, the form should be presented to your supervisor for review and his or her comments. You and your supervisor will then each sign the form. Your signature doesn’t mean you agree with your supervisor’s review. If you feel you have been treated unfairly, follow the grievance process in your employee handbook.

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Adding Value to Your Work

If you see a better way to perform your role, a way to create a new efficiency in any process you use or any other way to improve your individual or group performance, this is your opportunity to suggest changes in your role and the tools, processes and procedures you use. You can start this process if a performance appraisal calls a need or inefficiency to your attention or if you just get an idea of how to do things in a better way!

Start the process by revising your individual Position Matrix™ to indicate the proposed changes in your macro or expanded activities, the tools and processes you use, your level of responsibility or your impacts on others. If the change involves a change in a tool or process, note the new tool or process on your Position Matrix™ and write out a brief description or draw a picture or diagram of the new tool or process. Nothing formal is required. All you need is something that gets your idea across to your key impacts and supervisors and gets you credit for the idea!

You should then present the revised Position Matrix and supporting documents to your key impacts. Review the idea with them and see if they agree. Once you have discussed it with the key impacts and they have added their comments (either good or bad), present the revised Position Matrix™ to your supervisor for his or her review and comment. Your supervisor will take it from there if her or she agrees with the idea!

Your Responsibilities as a Key Impact or Supervisor

Many of you will be key impacts and some of you will be supervisors. From the above description of the Performance Appraisal and Adding Value to Your Work processes, you will note that you have important responsibilities in these processes. Please respond to others in a prompt and courteous manner in using these processes as you would want them to respond to you if you were initiating either process. Remember that you should be driven by fairness, objectivity and improving the performance of all individuals, your work unit and your employer's business.

Document Team Procedures

Why document our procedures?

Documented procedures are crucial in today's companies, but very few businesses take the time to develop them. As we go about the day to day routine of performing our roles, we create ways of doing tasks that get the job done. Often, only a very few or one person understands how to perform essential tasks. If any of these people are sick, on vacation, or leave the company, it can be difficult to determine exactly what needs to be done. If you depend on another person to perform his or her tasks in order to perform your role, and that person is unavailable, it can make it very difficult or impossible to get perform your role. That is why it is important for companies to have written procedures to insure continuing operation. In addition, written procedures make it easier to train new employees, for you to learn another person's role, and assure your companies customers that they will be getting a consistent product.

What is a Document Team?

The Position Matrix™ Communication System utilizes a Document Team Process to develop and record Procedures and Work Instructions used in your company. Document Teams are made up of employees in a company performing the tasks that need recording. Who better to write the documentation than the employee or employees performing the task.

Documentation Teams are chosen by reviewing the information gathered from the Position Matrices™. The tools & processes, and Macro Activities are reviewed to determine which

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employee or employees will take part in the various teams. Depending on the procedure to document, a committee could have one member or many members. In some companies, with a team of people performing the same function, representatives will be chosen to create the procedures. These procedures will then be reviewed by the rest of the group for accuracy.

What happens if I am chosen to be on a Document Team?

Your supervisor will let you know if you have been selected to be on a Document Team. A date and time will be set for a team meeting. You will be told which procedure or procedures you are to write down and in what format your company is looking for. A writer for the group is chosen and it is this person's role to keep notes and record the actual procedure.

Procedures can come in many forms, however it is important to keep in mind that the best way to write them is to keep them simple. Procedures are easiest to follow when they are written using simple language that everyone can understand. Sometimes procedures are already written in the form of user manuals that came with various pieces of equipment or software. A written procedure can then be expressed simply by writing "Refer to the equipment manual pages 3-5. The manual is stored in the supervisors office and is dated (date)."

After the procedure is developed and written, it is reviewed and approved by the rest of the group.

Periodic audits on the effectiveness of the written procedures should be completed and documentation changed as needed.

Additional Resources

Following are additional resources and forms for your use.

[Position Matrix™ form](#)

[Verb List](#)

[Position Essentials Worksheet](#)

[Performance Appraisal Form](#)

[Example Completed Position Matrix and Performance Appraisal Forms](#)

POSITION MATRIX™

Name/Position:

1

Reports To:

Company/Unit

Key Goals of Supervisor

2

Organizational Sketch

4

Key Goals of Position

3

Macro Activities	#& %	Expanded Activities (10 or Fewer Action Statements and Expected Results)	Tools/Processes Used	Level of Responsibility	Key Impacts
5		6	7	8	9

Position Challenges:

10

11

Position Matrix™ form © Roster, Inc., 1994

This Position Matrix™ © Roster, Inc., September 28, 2000

Note: The Position Matrix™ is the subject of *Identifying, Placing, and Evaluating Employees* from Irwin Professional Publishing, © Richard D. Irwin, Inc., 1994

Document3

[Return to Position Matrix Workshop Handbook](#)

POSITION MATRIX™

Name/Position: _____ Reports To: _____ Company/Unit _____

<p>Key Goals of Supervisor</p>	<p>Organizational Sketch</p>
<p>Key Goals of Position</p>	

Macro Activities	#& %	Expanded Activities (10 or Fewer Action Statements and Expected Results)	Tools/Processes Used	Level of Responsibility	Key Impacts

Position Challenges:

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 Note: The Position Matrix™ is the subject of *Identifying, Placing, and Evaluating Employees*
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Position Matrix Communication System Verb List

-A-	Chart	Dispel	Format
Access	Check	Dispense	Fulfill
Accomplish	Clean	Dispose	Function
Accord	Clock	Dissolve	
Accumulate	Close	Distribute	-G-
Acquire	Combine	Diversify	Gain
Act	Communicate	Divert	Gather
Adjust	Compensate	Divide	Gauge
Administer	Compile	Draw	Get
Advance	Complete	Drill	Go
Advise	Compose		
Aid	Consult	-E-	-H-
Align	Coordinate	Earn	Handle
Allocate	Correct	Ease	Heat
Allow	Critique	Edit	Host
Amend		Elect	
Analyze	-D-	Elevate	-I-
Answer	Debate	Eliminate	Identify
Apply	Decide	Employ	Illuminate
Appoint	Declare	Enclose	Illustrate
Appropriate	Defend	Encourage	Impact
Approve	Define	Endorse	Implement
Assemble	Delegate	Enforce	Improve
Assess	Deliberate	Enhance	Inaugurate
Assign	Deliver	Ensure	Increase
Assist	Demand	Enter	Incur
Associate	Demonstrate	Erase	Indicate
Assume	Depict	Erect	Inject
Attain	Deploy	Establish	Input
Attempt	Deposit	Estimate	Inquire
Avoid	Describe	Evaluate	Insert
Award	Design	Examine	Inspect
	Designate	Exchange	Install
-B-	Detail	Execute	Institute
Begin	Detect	Exercise	Instruct
Blend	Determine	Exhibit	Insulate
Break	Develop	Expand	Insure
Bring	Devote	Explain	Interact
Broker	Diagram	Explore	Intercede
Brush	Dictate	Export	Intercept
Build	Diffuse	Extend	Interview
	Dilute	Extract	Introduce
-C-	Direct		Invent
Calculate	Disarm	-F-	Invest
Call	Disburse	Fabricate	Investigative
Cash	Discern	Fasten	Invoice
Catalog	Disclose	Figure	Invoke
Cater	Discontinue	File	Involve
Cause	Discount	Fill	Issue
Cement	Discover	Film	
Center	Dismantle	Fit	-J-
Certify	Dismiss	Flavor	Join
Change	Dispatch	Form	Justify

-K-

Kindle

-L-

Labor
Launch
Lay
Layout
Lead
Learn
Leave
Let
Level
Lift
Lighten
Limit
List
Litigate
Load

-M-

Mail
Maintain
Make
Man
Manage
Maneuver
Manipulate
Manufacture
Mark
Mask
Match
Mate
Measure
Meet
Melt
Memorize
Mentor
Mete
Migrate
Mill
Modify
Mold
Monitor
Mount
Move

-N-

Nail
Navigate
Negotiate
Network

-O-

Observe

Obtain
Open
Organize
Originate
Oversee

-P-

Pack
Pad
Paint
Participate
Pass
Perfect
Perforate
Perform
Permit
Persuade
Photograph
Pick
Plan
Plumb
Post
Practice
Predict
Prep
Prepare
Prescribe
Present
Preserve
Preside
Prevent
Price
Prioritize
Probe
Process
Procure
Produce
Proffer
Profile
Profit
Program
Prohibit
Project
Promote
Prompt
Prop
Propose
Prosecute
Protect
Protest
Provide
Purchase
Push

-Q-

Qualify

Quantify
Quote

-R-

Raise
Rank
Rate
Receive
Recommend
Reconcile
Record
Recount
Recoup
Recover
Re-create
Research
Resolve
Review
Rework

-S-

Schedule
Sell
Start
State
Stay
Steer
Stock
Supervise

-T-

Tab
Tag
Tailor
Take
Target
Terminate
Time
Touch
Track
Trade
Train
Transact
Transfer
Transform
Translate
Transmit
Travel
Trim
Truck
Turn

-U-

Understand
Undertake
Undo

Unfold
Unify
Unlock
Use

-V-

Verbalize
Verify
View

-W-

Walk
Wander
Want
Wash
Watch
Wear
Weld
Write

-Y-

Yank
Yield

-Z-

Zap

[Return to Position
Matrix Workshop
Handbook](#)

Performance Appraisal

Incumbent's Name: _____	Period Covered: _____ to _____
Supervisor's Name: _____	Final Weighted Rating: _____

Suggested Rating	Macro Activity and % of Time	Comments:	Position	Incumbent's Suggested Rating and Comments
				Signature _____ Date _____

Suggested Rating	Macro Activity and % of Time	Comments:	Key Impact's Suggested Rating and Comments
			Rate only Macro Activities for which you are a Key Impact Signature _____ Date _____

PERFORMANCE DEMANDS

Physical			
	Name	Duration of Frequency	Criticality
1	Sitting		
2	Standing		
3	Walking		
4	Lifting		
5	Carrying		
6	Climbing		
7	Balancing		
8	Bending		
9	Stooping		
10	Crouching		
11	Kneeling		
12	Crawling		
13	Reaching (Sit)		
14	Reaching (Stand)		
15	Turning		
16	Twisting		
17	Pushing		
18	Pulling		
19	Gripping (hand)		
20	Finger controlling		
21			
22			

Mental			
		Very Limited	Very Substantial
1	Decision making		
2	Researching		
3	Planning/scheduling		
4	Compiling/classifying/gathering		
5	Transcribing		
6	Analyzing		
7	Short term memory		
8	Touching		
9	Seeing (acuity)		
10	Seeing (color)		
11	Hearing		
12	Smelling		
13	Tasting		
14			
15			
16			

Environmental			
	Name	Duration of Frequency	Criticality
1	Unprotected heights		
2	Moving machinery		
3	Changing temperature/humidity		
4	Exposure irritating particles		
5	Driving equipment		
6	Excessive noises		
7	Radiant/electrical energy		
8	Solvents, grease, oil		
9	Slippery/uneven walking surfaces		
10	Below ground		
11	Unusual fatigue factors		
12	Explosives		
13	Vibration		
14	Hands in substances		
15	Working alone		
16	In proximity with others		
17	Working inside		
18	Working outside		
19			
20			

POSITION MATRIX™

Name/Position: Kim Goldstein/Accountant

Reports To: President

Company/Unit House of Publishing

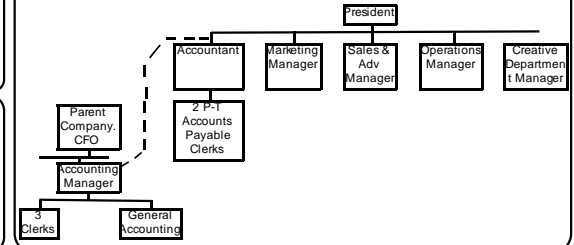
Key Goal of Supervisor

- Safeguard and effectively use assets to earn profit of 9% of net sales '93.
- Grow sales by 10% and creative department capacity by 7% during '93.
- Realize positive cash flow in every quarter.

Key Goal of this Position

- Improve A/P so discounts earned increase 3% and cash flow (bank balance) increases by over 3% in '93.
- By year end, have created/used systems to better identify labor costs to allow for improved magazine & book pricing.

Organizational Sketch



Macro Activities	# & %	Expanded Activities (10 or Fewer Action statements and Expected Results)	Tools/Processes Used	Level of Responsibility	Key Impacts
Assure Payroll	#1 - 30%	<ul style="list-style-type: none"> • Code sheets on each employee for payroll (hours, time off, etc.) before sending to parent company accounting department by 10:00 am Mondays. • Distribute checks (hand out, mail, direct deposit) each Friday am. • Write payroll report monthly (time off, rate changes, etc.) and 	Intracompany Runner Payroll Input Sheets D. E. C. Mini-Computer w/ "Payday" Software	Sole	<ul style="list-style-type: none"> • Parent Company Accounting Manager
Develop Labor Cost Tracking System(s)	#2 - 30%	<ul style="list-style-type: none"> • Read all software updates and write process to account for labor per each job. • Teach associates and clerks in accounting, operations, sales, marketing, & creative groups how to log and/or look up weekly data on the system. • Help programmer write specs on reports needed weekly and monthly 	In-House Programmer Analyst Covalent Computer™/Shop-Load-Labor-Track™ System Terminals in all Accounting, Operations, & Creative Department Work Areas	Sole	<ul style="list-style-type: none"> • Marketing Manager • Programmer
Assure Improved Accounts Payable Processing	#3 - 40%	<ul style="list-style-type: none"> • Write schedule, set weekly discount rates to take (vs rates to ignore), set days-till-payment for non-discount invoices, and conduct training for 2 P-T A/P clerks. • Look at/spot check a few items per day for correct discount taken, taxes paid, vendor #s, approvals, time-to-payment, etc. • Personally code/process 1099 items (payments to contributing editors and canceled subscriptions) & write weekly journal entries. 	A/P Procedures Manual Terminal on each Desk-Computerized A/P System A/P Aging Report From MIS Department Weekly	Sole	<ul style="list-style-type: none"> • Parent Company General Accountant

Position Challenges: General ledger, statements, cash management (banking), & taxes handled by Parent Company accounting dept. There are 656 contributing editors.

Employee: Kim Goldstein 1/5/93

Supervisor: Robert Wong 1-7-93

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Performance Appraisal

Incumbent's Name: Kim Goldstein

Period Covered: 1/5/93 to 7/1/93

Supervisor's Name: Robert Wong

Position Incumbent's Suggested Rating and Comments		
Suggested Rating	Macro Activity and % of Time	Comments:
5 (out of 5)	# 1 - 30%	For this 6 mo period we experienced no errors, no employee complaints, delivered timely payroll reports, and cross-trained one of the A/P clerks on our payroll software. Audit of last year's P/R records showed no discrepancies or missing file items.
4	# 2 - 30%	I am now 1/2 way through the labor project. All material has been read, procedures written for users, and all targeted users have been through at least one course on using the programs. I am 3 weeks behind the training schedule agreed to with the marketing manager.
5	# 3 - 40%	Discounts earned have increased 4% (goal was 3%), cash flow has improved by 5% (goal was 3%), audit was without discrepancy, credit rating maintained as "high," and all items were processed correctly and turned in to the general accountant when due or before.

Kim Goldstein 7/1/93

Signature _____ Date _____

Key Impact's Suggested Rating and Comments		
Suggested Rating	Macro Activity and % of Time	Comments:
3	#2 - 30%	Kim has done a good job with the training part of the project and she is very efficient. But, I am concerned about her effectiveness on this project. She has postponed five meetings to define needed report formats and specifications for data gathering to produce these reports. We discussed this last January when I was given a copy of her Position Matrix™. There is no way I can now meet my deadlines on this project.

Jon Gates 7/1/93

Signature _____ Date _____

Performance Appraisal

Page 2

Incumbent's Name: Kim Goldstein

Period Covered: 1/5/93 to 7/1/93

Supervisor's Name: Robert Wong

Final Weighted Rating: 4.4

Supervisor's Rating and Comments		
Suggested Rating	Macro Activity and % of Time	Comments:
5	#1 – 30%	I concur with Kim's assessment 100%. Joe Jones mentions that P/R input sheets should reach him by 9am instead of 10am on Monday. This was the only negative brought forward by Joe. While I believe a change to Kim's P.M. is in order to define performance for the next 6 mo period, it is unfair to let this comment influence last periods performance appraisal. It should have been brought forward when Kim gave Joe a copy of her P.M. in January and ask for his input.
3	#2 – 30%	I have to agree with the programmer's comments. By putting off the specification and report definition meetings all 1st quarter, Kim made it impossible for Jon to meet his target dates. He even pointed this out as a potential problem when he received Kim's P.M. in Jan. The slippage in our agreed upon training schedules put reaching our labor tracking system implementation goals for 1993 in jeopardy. We will start having weekly meetings on this project until I feel it is back on solid ground.
5	#3 – 40%	I and Kim's Key Impacts concur with her. Outstanding performance for the period in this area. She forgot to mention that she also improved the documentation during this period.

I acknowledge that I have been given a copy of this performance appraisal and that my supervisor has explained the final rating. My signature does not necessarily signify that I concur with the rating.

Kim Goldstein 7/5/93

Incumbent signature and date

I certify that I have explained to the incumbent the final rating and provided him or her a copy of this performance appraisal.

Robert Wong 7/5/93

Supervisor signature and date