

Completed Staff Work

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# Agenda

- What is CSW ?
- Why is it important ?
- When can we use CSW ?
- Basic Principles
- The 8 steps
- Final Check
- Acknowledgments
- Questions, comments
- What else do I do ? (Blatant advert)

# What is CSW ?

- A term borrowed from the United States military forces.
- It is the study of a task, opportunity, or problem, and presentation of a *sound* solution by a team member to a leader.
- Leader should simply be able to indicate approval or disapproval.
- A management tool that creates consistent and reliable problem solving and subsequent recommendations.

# Why is CSW important ?

## Examples:

- It is efficient & effective.
- People using CSW seek out problems and fix them before they become too great.
- Creates consistent results.

# When can we use CSW ?

- Written and verbal reports, presentations.
- New procedure or process.
- Evaluation of costs and benefits.
- Initiating action.
- In any decision making process.

# Basic Principles

## Examples:

- Team member works out the details of the task.
- Consult other team members.
- Product in finished format when presented to leader.
- *Advise* the leader what *they* ought to do. They need answers, not questions.
- Leader merely approves or disapproves.

# The 8 Steps to CSW

1. Identify the issue and establish work process.
2. Collect and analyse the data.
3. Develop and assess options.
4. Develop recommendations & draft the report.
5. Obtain decision maker approval.
6. Present to the approving body.
7. Implement the approved decision.
8. Follow-up.

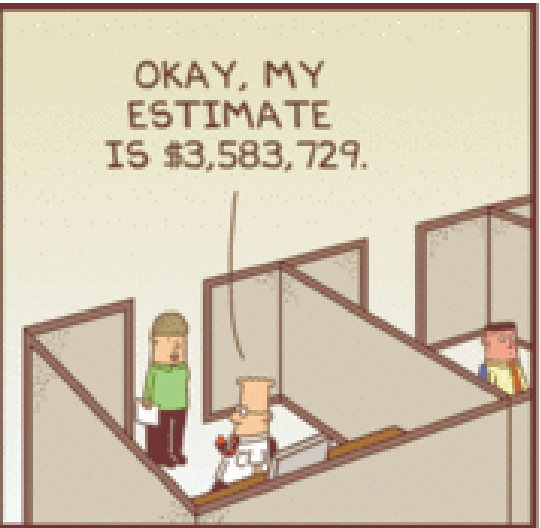
# 1. Identify the issue and establish a work process

Example activities:

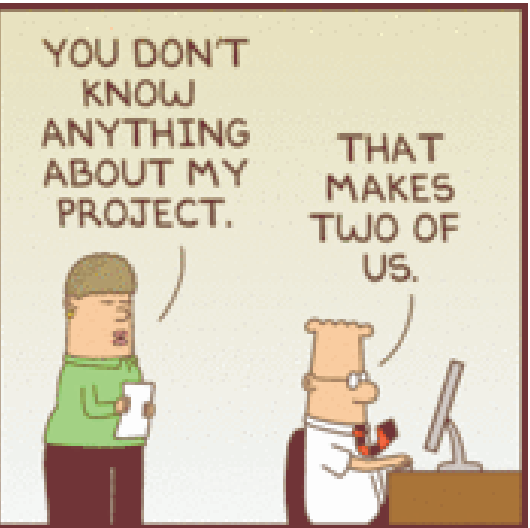
- Determine scope.
- Clear statement of the issue.
- Identify decision makers.
- Determine characteristics of output.
- Check decisions against original issue statement.



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## 2. Collect and analyse the data

- Research data and information.
- Involve stakeholders.
- Seek customer input.
- Check actions taken so far against the original issue statement.

# 3. Develop and assess options

- Use criteria to develop final recommendation.
- Criteria examples:
  - Cost.
  - Impact on policy.
- Check recommendations against the original issue statement.

## 4. Develop recommendations and draft the report

Example activities:

- Seek consensus of stakeholders.
- Select the best option.
- Resolve conflicts.
- Circulate draft report for feedback.
- Check report against the original issue statement.

## 5. Obtain decision maker approval

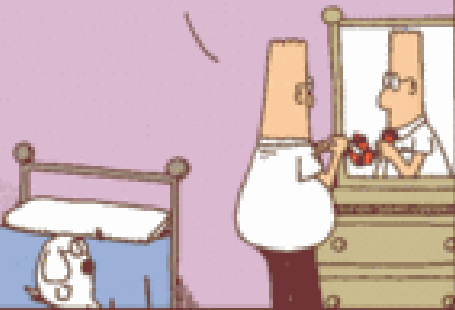
- Alert decision maker to potential unresolved conflicts.
- Determine senior leadership involvement.

## 6. Present to senior leadership (If appropriate)

- Determine the best presentation method.
- Publish report and make presentation.
- Obtain senior leadership decision.

I'M REALLY NERVOUS ABOUT THIS PRESENTATION FOR THE BIG BOSS. GOT ANY TIPS FOR ME?

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# 7. Implement the approved decision

- Communicate
- Determine implementation strategy:
  - What will help from work done already ?
  - Use Project Management principles  
(a whole new topic !)

# 8. Follow-up

- Monitor implementation.
- Evaluate implementation.

# Final Check

If you were the leader would you be willing to sign the paper you have prepared, and stake your professional reputation on its being right?

If the answer is no, take it back and rework it, because it is not yet completed staff work.

# Acknowledgments

- A directive issued in 1942 by the Provost Marshal General, U. S. Army.
- First Canadian Army copy signed by Brigadier G. E. R. Smith, DDST, Supply and Transport Branch, HQ, First Canadian Army and dated 9 August 1943, obtained from <http://www.dolan-heitlinger.com>.
- RAY W. WILSON, Phoenix City Manager Sept 14th 1950
- C. V. “BUDDY” MARTINETTE JR., chief of Lynchburg (VA) Fire & EMS, in “Fire Engineering” October, 2005.  
<http://www.fireassociates.com/COMPLETED%20STAFF%20WORK.htm>
- <http://www.qitc.com/>
- JE Lincoln and Associates: The Top 10 Frequently Asked Questions  
<http://www.jelincoln.com/GMPTop10.phtml> April 4th 2007

# What we looked at:

- What is CSW ?
- Why is it important ?
- When can we use CSW ?
- Basic Principles
- The 8 steps
- Final Check
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Next.....

# Questions ? Comments ?

A detailed downloadable document on  
this subject is on my website:

[www.vanessawilkinson.com](http://www.vanessawilkinson.com)