Does Your Task Management Still Work in 2021?

Why Organizations Need to Rethink Frontline Execution
Whether you are in retail, healthcare, manufacturing, or another industry, every organization’s leadership team strives for greater efficiency. The goal? Every task from big to small done in perfect compliance with standards and regulations, done at the right time, and done in as streamlined a way as possible.

To make this happen, these leaders rely on task management systems, hoping that these systems will ensure every necessary task gets checked off and done well. But while typical models have a wide range of benefits, they do leave important gaps that keep organizations from reaching their full potential – and these gaps may only continue to widen as the market and the workforce continue to evolve.

In this white paper, we’ll examine the current model of task management, why it simply doesn’t meet the needs of today’s fast-moving organizations, and how the new WorkJam task management system can maximize cost savings through improved efficiency, compliance, productivity, and workforce retention.
Task Management: More Important Than Ever

Organizations with a large geographically widespread workforce face increasing pressure to manage these teams and cornerstone to workforce management is task management.
A recent report from HR.com reveals multiple challenges that are directly linked to task management issues:

• Two-fifths of the survey participants said that “a lack of employee training” causes their organizations to struggle with staying compliant. Unsurprisingly, there is a considerable amount of correlation between being well-trained and compliant task management. Nonetheless, if compliance-related tasks are not outlined clearly (or delivered clearly by the manager), compliance efforts will suffer.

• Only 12% agreed that “Your company has the capability to properly predict and plan for labor needs.” Current task management methodology carries a significant amount of the blame for companies’ inability to forecast labor needs. Why? Because the people doing the forecasting do not have a clear view into the difference between estimated time for tasks and actual time for tasks. If a manager thinks it should take 7 minutes for cleaning staff to clean each room in a hotel, but it actually takes 10, upper management has no way to accurately predict how many cleaners they will need for an upcoming conference.

• A mere 16% of respondents said they have all the data they need to view and report on KPIs. Because traditional task management models rely on frontline managers as both gatekeepers and scorekeepers, it makes it impossible for head office to obtain comprehensive and accurate data on
vital metrics highlighting productivity and efficiency – which are the true canary in the coal mine when it comes to measuring the health of the overall organization.

Successful organizations are those that prioritize the implementation of a comprehensive and precise task management system. Why?

- It is the most reliable way to ensure consistency of results across all locations and all teams.
- It gives leadership assurance that tasks have been completed on time and accurately.
- It provides the accurate and timely data that is needed for effective process improvement.

In short, a task management system acts as the central nervous system of any large organization, informing employees of what they need to do and how to do it well, giving leadership feedback on whether (and how) tasks are done, and providing valuable data when seeking for ways to improve processes and compliance.

If task management is not efficient or effective, the snowball effect can be disastrous:

- Customer (or patient, or guest) experience can suffer due to vital tasks going undone. If, for example, clothing racks are frequently messy and disorganized due to associates not thinking to address them, customers will grow frustrated with the increased effort required to find their size and may go elsewhere.
- Compliance, particularly with health and safety regulations, may be compromised. A new member of the cleaning staff member may forget to put out cautionary markers when floors are wet. Or a foreman might not think to check the dates on the fire extinguishers.

- Organizations may wind up hemorrhaging money due to poor use of staff time. According to IDC, companies lose 20 to 30 percent in revenue every year due to inefficiencies. Whether it’s due to redundant tasks, bottlenecks, mistakes due to miscommunication, or lack of data which might allow for better processes, operational inefficiency is frustrating for employees and incredibly expensive for organizations.
Task Management Today (and Yesterday)

Much like a basic to-do list, the overarching principle behind most task management platforms is the ability to create checklists associated with various tasks, assign the tasks to employees, and then check off the tasks once completed.
Typically, operational leadership will outline the tasks showing how they need to be done and then send those lists to location managers. From there, it is up to the location manager to assign the tasks, determine whether they have been completed in a satisfactory manner, and report back up to leadership on which tasks have been done and how long they took. In essence, tasks are managed at a very high level and rely heavily on manual communication in the store.

This can become problematic, for several reasons:

**TWO MANY REDUNDANT SYSTEMS**

Effective task management shouldn’t be done in a vacuum. Managers need to be able to cross-reference task lists with shift schedules, skills & certifications to ensure proper coverage of more skilled/experienced employees that have taken the training. This way, for example, tasks requiring **HCS/WHMIS** training are not assigned to employees who have not yet received this training. They also need access to real-time encrypted communications to see if new directives and procedures have been announced.

**LACK OF BIG PICTURE DATA**

Having multiple operating platforms (tasks, scheduling, training, communications) is not only expensive to operate, but it makes it incredibly difficult for managers to integrate the information provided by these systems in a way that allows for effective operational decision-making. It also makes comprehensive data analysis – and any resultant improvement in procedures – completely unattainable.

**MISCOMMUNICATION**

In many cases, task details like checklists and planograms are printed out and distributed to frontline employees. Not only does this create massive amounts of waste (and increased costs) in paper and ink, but it also increases the odds of something being missed, misinterpreted, or even misplaced altogether.

**POOR ADOPTION RATES**

All too often, task lists wind up in the back office in a binder, on a bulletin board, or on a rarely used PC, with nobody but the manager thinking to check them. If the system is dated, a manager may be the only one who even knows how to use the task management system’s interface. As a result, staffers, as a matter of process, simply don’t think to (or can’t) review these lists when the manager isn’t around and will only perform the tasks that they remember to do, potentially leaving several vital tasks undone.
The siloed, dated, non-transparent status quo simply won’t do anymore. To maximize efficiency and savings while improving processes, organizations need to take their task management out of the back-office and put it squarely where it belongs: Onto the floor and in the hands of the people actually doing the tasks.
WorkJam’s next-generation task management system does just that. Instead of relying on multiple siloed systems and archaic forms of manual communication, WorkJam’s task management system is part of a frontline management ecosystem that lives on employee or location-owned mobile devices.

Here’s how WorkJam is different:

**IT MAKES EMPLOYEES MORE EFFICIENT**

People will only use so many discrete systems and can only master so many platforms. Using a unified mobile digital platform for task management allows employees to learn and complete their tasks in a space where they already conduct other facets of their frontline work; training, communications, availability changes, shift swapping, & pick up.

On their very first shift, an employee can easily navigate the task management system and see what tasks they need to complete and how to do them the right way. Even if the manager is on vacation, every single staffer can receive accurate and updated task information in a clear, easy-to-understand fashion.

Additionally, the digital platform gives employees the tools to ask questions, take training, and get much-needed context for any of their tasks. This reduces frustration and improves adoption, but more importantly, it decreases the time it takes for employees to learn and perform their tasks, vastly improving efficiency and reducing expenses.

**The Takeaway: Because the platform is mobile-first and designed for a complete end-user experience, it has better adoption and hence, better results for task management.**

**IT HELPS MANAGERS OPERATE SMOOTHLY**

Not every task deserves the same level of priority. And yet, they do all need to be done. WorkJam’s system allows tasks to be assigned in numerous ways: to anybody, to particular people with certain skills, or to be completed as part of specific shifts.

This helps managers and frontline staff better manage tasks during busy times, creating a better balance between their primary duties and the other administrative/non-service/non-sell activities that are still essential to smooth operations.

**The Takeaway: Instead of facing a static task list, managers and associates get help prioritizing and managing tasks, making sure that everything gets done efficiently.**

**IT IMPROVES COMPLIANCE**

Quick: When were your first-aid kits inspected and updated over the course of the last year? If you need to dig into a filing cabinet or desktop files to get your answer, you’re spending more time than you need to. WorkJam’s digital task…
management solution also has auditing capabilities, allowing management - and above - to quickly and easily go in and cross-check what compliance tasks have been done at each location, and when.

In fact, because the WorkJam platform is mobile-first and has a high adoption rate with end-users, it creates unmatched levels of transparency into task completion and progress. Operational leadership can easily track tasks to completion in real-time, so they can rest assured that compliance-related tasks are being completed, instead of waiting days or weeks for checklists to be sent to them.

The Takeaway: It’s easy to prove - and stay in - compliance with a user-friendly digital system that shows task completion in real-time.

**IT DRIVES DYNAMIC IMPROVEMENT**

Checking off tasks is great, but what if those checklists could ensure the right follow-up tasks wind up on the right person’s to-do list?

Customizable workflows allow for quick task creation, making sure nothing slips through the cracks. For example, the workflow could have a rule indicating that if a certain task does not get completed during a shift, it gets assigned to an employee working the next shift. Or, it could stay with that shift and be assigned to someone working the next day - the choice is yours.

These workflows are also invaluable during facility walkthroughs. An assistant manager might note on their walkthrough checklist that the fire extinguishers are out of date. By checking “No” to the question on their task list, an automatic task to replace the extinguishers is created and assigned. Safety violations are reduced, and mass compliance is made much simpler.

When using the WorkJam task management system for compliance checks, store walks, etc., not only can the checklist trigger tasks if needed, it will also calculate a score, helping management and leadership clearly see where improvement is needed or has been made. At the end of the checklist, a score is automatically generated, with each question’s weight being completely customizable. To keep things convenient, skip-logic is built into the system, ensuring that the task lists contain no redundant or non-applicable questions.

The Takeaway: Workflows make sure no tasks slip through the cracks, while scoring gives managers clear insight on needed improvements.
The WorkJam task management system works beautifully on its own. But when combined with the entire WorkJam platform, the system can transform operations.

Here’s an example: Barb is the manager at a grocery store. She, and all other managers, receive a notification through WorkJam’s communication module that a certain brand of Romaine lettuce is subject to a recall. Barb quickly assigns a task to Adam in the produce department, asking him to remove all of the offending lettuce from the shelves. Dwight can also see that 82% of the entire company’s frontline staff has received and completed the survey acknowledging the recall and can see that number increase in real-time.

Beyond looking at tasks as a series of events, the WorkJam platform looks at frontline management as a system, not as a series of silos.

It only makes sense: Employee training affects how employees perform tasks, so why should those systems be separated? Employee task performance is naturally a big factor in employee rewards and recognition, so why should those systems be separated? And of course, internal communication affects every element of how your employees work, so why…well, you get the idea.

office, Dwight, the operations manager, can see that Adam - and Adam’s counterparts at every other store location - has checked off the task for removing all of the offending lettuce from the shelves. Dwight even have any way of knowing that the lettuce has indeed been removed, or that Barb already notified all employees? This is just one way in which the WorkJam platform helps organizations eliminate process bloat, reduce overhead, master compliance, and achieve new levels of efficiency and operational excellence.
Summary

*WorkJam* provides a task management solution that collaborates with everything that touches your labor force: productivity, engagement, upskilling, compliance, and more. And it does so in a way that is second nature to employees and reflective of the way they actually work. The result? A smart system that drives greater productivity, greater efficiency, and greater profit margins - in short, a much greater chance for your organization to thrive in 2021 and well beyond.

*For more information on WorkJam and how we can help you unleash the potential of your workforce, contact us today.*