

Job Profiles

Denne værktøjskasse indeholder følgende værktøjer:

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Introduction: Job Profiles - Does the employee know what to do?

Introduction

We all know the problem - a phone is constantly ringing and you're thinking, "Why doesn't anybody answer the phone?"

Your company is growing fast and the small organisation, which worked well as a "family," is changing face. Before everybody knew what to do, when and why and now the new assistant is not answering the phone, the new technician is using trade union methods instead of the rules and regulations of your company and the new salesman has the impression that he is the sales manager, not the sales representative. You have taken on new employees and until now, it hasn't been necessary to specify responsibilities other than verbally and in only a few terms. The larger the company, the more the employees need to know exactly what is expected of them and the areas for which they are responsible.

A new company strategy, with regard to staff policies, may need to be implemented, in accordance with the company's mission and vision. You may need to implement some staff policies, e.g. car, smoking and alcohol policies, benefits, rules and regulations, etc. In the case of defining responsibilities, the most effective tool is the Job Profile, which shows the function of the employee, the key responsibilities, the region, reporting structures, personal skills and qualifications together with experience and education.

Greater efficiency and teamwork will be the result of implementing job profiles and this tool will also be beneficial when trying to recruit the right employees in the future. Job profiles can be integrated with Performance Appraisal Interviews, Benchmarking, Career Paths, Work/Paper Flow Charts and Job Matching profiles in connection with salary surveys and analyses.

Author

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If you need advice about this theme do not hesitate to contact hw@henrikwbendix.dk

Otherwise this toolkit might inspire you:

- **Appraisal Interviews - How does your staff perform?**
Appraisal is the cornerstone of an organisation's approach to managing people and supports the achievement of corporate objectives. In the appraisal interview you review the performance of your staff, identify strengths and areas for development, evaluate performance against corporate objectives, and set mutual performance objectives for the future.
Find it at www.henrikwbendix.dk Check "Resources".

User Guide: Job Profiles

There are many considerations to make before completing a job profile. You need to contemplate about how fast your business is expanding, decide if there is room for promotion in the different jobs, and select a title for the promoted positions (for examples see sample career path – sales). It is a good idea to be a little visionary in this respect. One small company a few years ago, had given the title of manager to all the key employees, without taking into consideration whether these employees were good manager material for the future. This later created a problem when the new employees were more qualified for the managerial positions than the existing workers.

Checklist

To assist you in the process of filing out a job profile and to ensure involvement of key personnel in your company, you will find a checklist (see Checklist: Preparing Job Profiles), showing each phase to make before completing an individual job profile. These phases are described in details below.

Phase1: Management Meeting

Invite managers to discuss the necessity of implementation of job profiles. Make sure everybody accepts the implementation and then move on to discuss the following:

A) Actual functions and titles in the company

- Make sure that the existing functions match the company's business procedures
- Be careful not to implement a function just to suit an employee
- Make sure that the functions do not overlap
- It may be necessary to revise titles to make room for expansion and promotion
- Keep titles simple and if you trade internationally, have titles in both your local language and English
- It may be necessary to establish a temporary function, to enhance achievement of company goals.

B) The reporting structure – a clear picture of who reports to whom will make the work flow more effective

- Where two managers share one secretary, ensure a clear picture of priorities for the secretary in order to avoid frustration and stress
- Managers should avoid having more than 8 employees reporting to them. If this exists, split them up into two groups with a supervisor for each group
- In a matrix organisation, there may be a group manager and a technical manager. Make sure the managers agree on an employee's work priorities to avoid confusion.

C) Region split – have the regions (e.g. Jutland, The Baltic Region or Southern France) split up in accordance with market plans, customers and sales representatives.

These subjects should be in place before involving personnel in the completion of job profiles.

Phase 2: Staff Meeting

A meeting should be held to inform the rest of the staff of the outcome of the above mentioned management meeting. This will help avoid misunderstandings with regard to employees worrying about getting fired or being moved to another position. Appoint somebody to note the minutes and any good ideas that may arise during the meeting.

Phase 3: Meeting with HR Manager

Discuss qualifications, skills, education & experience needed for each job profile with the HR manager. This is particularly beneficial when recruiting new employees. In addition, by stipulating the desired level of qualifications and skills on each job profile, the existing employees will learn what is expected of them in their present position and possibly motivate them to educate themselves further in hopes for a promotion.

Phase 4: Interviews with key personnel

It is a good idea to seek the opinions and input of key personnel before actually completing the job profiles. This inspires acceptance and motivation. You should:

- Schedule a meeting with each key personnel (or perhaps invite them altogether)
- Make sure each key personnel receives a specific job profile before the meeting and ask them to prepare their comments
- Inform them of the results of the management meeting and how important it is for you to have their support
- Make sure you appoint somebody to take the minutes of the meeting
- Plan on implementing the good ideas and accept constructive criticism.

Phase 5: Completion of job profiles

You will find a questionnaire to be filled out by your employees (see Form 3: Employee Information) to help you complete the profiles. Once this is done, you will have a good overview of everybody's education and experience as well as their main assignments. With regard to the field "Critical Success Factors," the relative supervisor or manager along with the individual employee should specify this. The next step is to actually complete the job profiles. One person, preferably the HR Manager, or person in charge of staff affairs should do this, in order to ensure uniformity.

Phase 6: Approval by management

All job profiles are now ready to be approved by the managers.

Phase 7: Hand out the job profiles

The job profiles are now ready to be handed out to all personnel by the managers and supervisors:

- The managers and supervisors are to inform the employees of how the results of the job profiles have been reached and how the job profiles are to be kept up to date by each of the employees.
- Any amendment to an employee's function must be noted on the job profile, and the contents may be revised at the same time as the regular staff performance appraisal interviews, which are normally held once a year.

The above phases have been stipulated in the checklist as "assignments". Besides each assignment there is room to note the participants of each meeting; the actions to be made; the person responsible for each action; deadlines; and status, where the progress of each step can be noted. You may find it beneficial to draw on the competence and experience of an external consultant during all seven phases.

Job Profile

A complete job profile usually fills about one to one and a half pages, depending on the position of the employee (see sample – Sales Representative). Job profiles for top executives or managers will most likely fill roughly two to three pages.

The figure below shows what a job profile normally contains. See form 1: Job profile.

Subject	Specification	Examples	General Comments & Advice
Function	A short general specification of the purpose of the job – maximum one or two sentences.	a) (SALES) to plan, coordinate and carry out all sales activities that will improve our customers' business processes and contribute to teaching the company's goals b) (HR) to plan, co-ordinate and implement all HR activities in Denmark and to ensure maximum efficiency and quality in the HR area c) (CUSTOMER SERVICE TECHNICIAN) to give technical service to the customers, with regard to installation and maintenance of our products.	It would be beneficial here, to involve the other managers in your company in order to compare cross-functional positions.
Region	Area of responsibility.	a) Jutland and Fyn b) Denmark c) Germany	If two employees have the same area of responsibility, then it is necessary to split the region up further, perhaps with regard to types of customers.

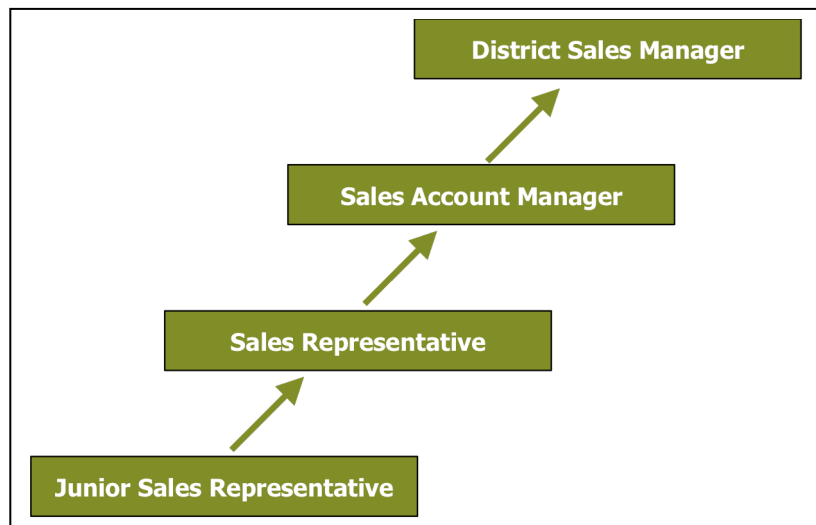
Subject	Specification	Examples	General Comments & Advice
Key Job Responsibilities	Main responsibilities.	a) Sales of software products b) Development of staff with regard to personnel and technical training c) Installation of products one, two and three	Which areas should the employee focus on? Is the employee to work independently or together with other employees, perhaps on cross-functional assignments? Is the employee responsible for certain products or for the reporting of statistics, etc.?
Employee Responsibility	The employees you are responsible for.	a) All junior sales representatives b) Names of employees	It may be useful to add whether the person is also responsible for development and training of these employees.
Reporting Structure	The direct superior of the employee.	a) Name of manager	In matrix organisations, there will perhaps be two managers – the functional manager, with regard to the employee's technical responsibilities, and the manager responsible for the group.
Personal Qualifications & Skills:	The personality traits and characteristics that the employee needs in order to carry out the job requirements.	a) Strong sense of urgency b) Able to inspire trust and confidence with customers and co-workers c) Requires minimal supervision	These are personal skills and not to be confused with work experience. These qualifications and skills are general for the particular job function and not the skills of the specific employee.
Education & Experience	Education, work experience and relevant knowledge of different products desired for the specific position	a) Degree in sales & marketing b) Five years of experience with sales c) Excellent knowledge of products one, two or three	Experience is not just job title but relates to actual jobcontent.
Critical Success Factors:	Success criteria, which both the employee and the manager can use to measure the employee's work performance.	a) That the junior sales representatives have reached a high level of sales techniques b) That cross-functional meetings boost the service level and improve customer satisfaction c) That communication between the sales department and the secretaries will have improved.	These criteria may change at intervals, most likely each year. The employee will be able to obtain a clear picture of the manager's and company's expectations and how success is to be achieved. A highly success employee will be able to accomplish more because of their motivation and satisfaction with their job performance.

Subject	Specification	Examples	General Comments & Advice
Main Assignments	Specification of actual assignments to be completed and time allotted to each assignment.	a) Phase 2 of quality management project- deadline Sept. 200X b) Sales of product 1) & 3) to small businesses – deadline Nov. 200X c) Customer satisfaction report – deadline, end of year d) Sales training of representatives – deadline, end of 2 nd quarter e) Interview training for managers – deadline, end of 3 rd quarter	This field is optional and will probably not be used when recruiting new employees. This is not to be confused with goals and targets (particularly in the case of sales employees) that are usually specified on a separate form and considered as being an integral part of the employment contract. In the case of a Sales Account Manager, the assigned customers will also be stipulated on this separate form.

Career Paths

It is a good idea for each department manager to create career paths (see Form 2: Career Path) for their own department, in accordance with the company's strategies and goals. For example in Sales (see sample Career Path for Sales) and in Customer Service the career path could comprise of positions such as:

Junior Technician, Senior Technician, Systems Specialist, Systems Engineer, Senior Systems Engineer, Customer Service Manager.



These career paths are normally created when companies are expanding and production is having the effect that assignments need to be split up further between the employees. Furthermore, employees hopefully will be motivated to work harder and more diligently knowing that they have the opportunity for a promotion.

Sample Job Profiles - Sales

Sales Representative	
Function:	To plan, coordinate and carry out all sales activities that will improve customers' business processes and contribute to reaching the company's goals.
Region:	Jutland and Fyn
Key Job Responsibilities:	<ul style="list-style-type: none"> • Sales to large accounts. • Work very closely with sales assistant and customer service, in order to enhance sales and create a balance between sales and service. • Acquire knowledge of business processes, business objectives and applications of customers. • Develop and carry out customer presentations. • Gather in depth product knowledge and functional application of company products. • Report success stories and practices that have not failed yet.
Employee Responsibility:	The Sales Representative is responsible for the motivation and work efforts of the junior sales representatives together with the development of skills and qualifications.
Reporting Structure:	The Sales Representative reports to the District Manager of the region, who in turn reports to the Managing Director of the company.
Personale Qualifications & Skills:	<p>Good team player Excellent communication and presentation skills Good organisational and time management skills Enjoys showing what products can do for a customer Focuses on customer satisfaction Is very self-motivated.</p>

Sales Representative	
Education & Experience:	<ul style="list-style-type: none"> • Minimum five years of experience in selling, preferably to large accounts • In-depth knowledge of products 1) 2) & 3) • Minimum eight years of experience with XXX products • Business degree in trade and marketing • Good knowledge of the market • Experience with e-commerce initiatives an advantage
Critical Success Factors:	<ul style="list-style-type: none"> • The quarterly Customer Satisfaction Report shows 90% customer satisfaction • That Customer Service expresses their satisfaction with your teamwork activities and cross-functional interest • Minimal supervision • That you inspire trust and confidence internally as well as externally. • You will go the extra mile
Main Assignments:	Quality Management Project with Customer Service.

Attention: Goals and Targets will normally be specified on a separate form (compensation form) together with assigned customers in the case of a Sales Account Manager. The compensation form is usually considered an integral part of the employment contract.

Customer Service Technician	
Function:	To give technical assistance to customers, with regard to installation and maintenance of products 1) 2) & 3).
Region:	Denmark
Key Job Responsibilities:	<ul style="list-style-type: none"> • Installation and maintenance of products 1) 2) & 3). • Planning daily time schedules. • Development of courses both external & internal. • Instructor on external courses. • Support for Sales Representatives. • Co-operation with customers' Operations Managers. • Participation in 24 hour on call system.
Employee Responsibility:	Two workmen, who assist the technician.
Reporting Structure:	The Customer Service Technician reports to the Customer Service Manager.
Personale Qualifications & Skills:	<p>Independent. Good team player. Focuses on customer satisfaction. Strong cooperation skills. Quality and security orientated.</p>
Education & Experience:	<p>Solid technical experience with complex installations. Minimum five years experience with products 1) 2) & 3). Relevant education from Technical College. Knowledge of English an advantage.</p>
Critical Success Factors:	<p>The quarterly Customer Satisfaction Report shows 90% customer satisfaction. The workmen are satisfied with their development and training opportunities. Can solve complex technical problems without supervision. Will go the extra mile.</p>
Main Assignments:	Quality Management Project with Sales.

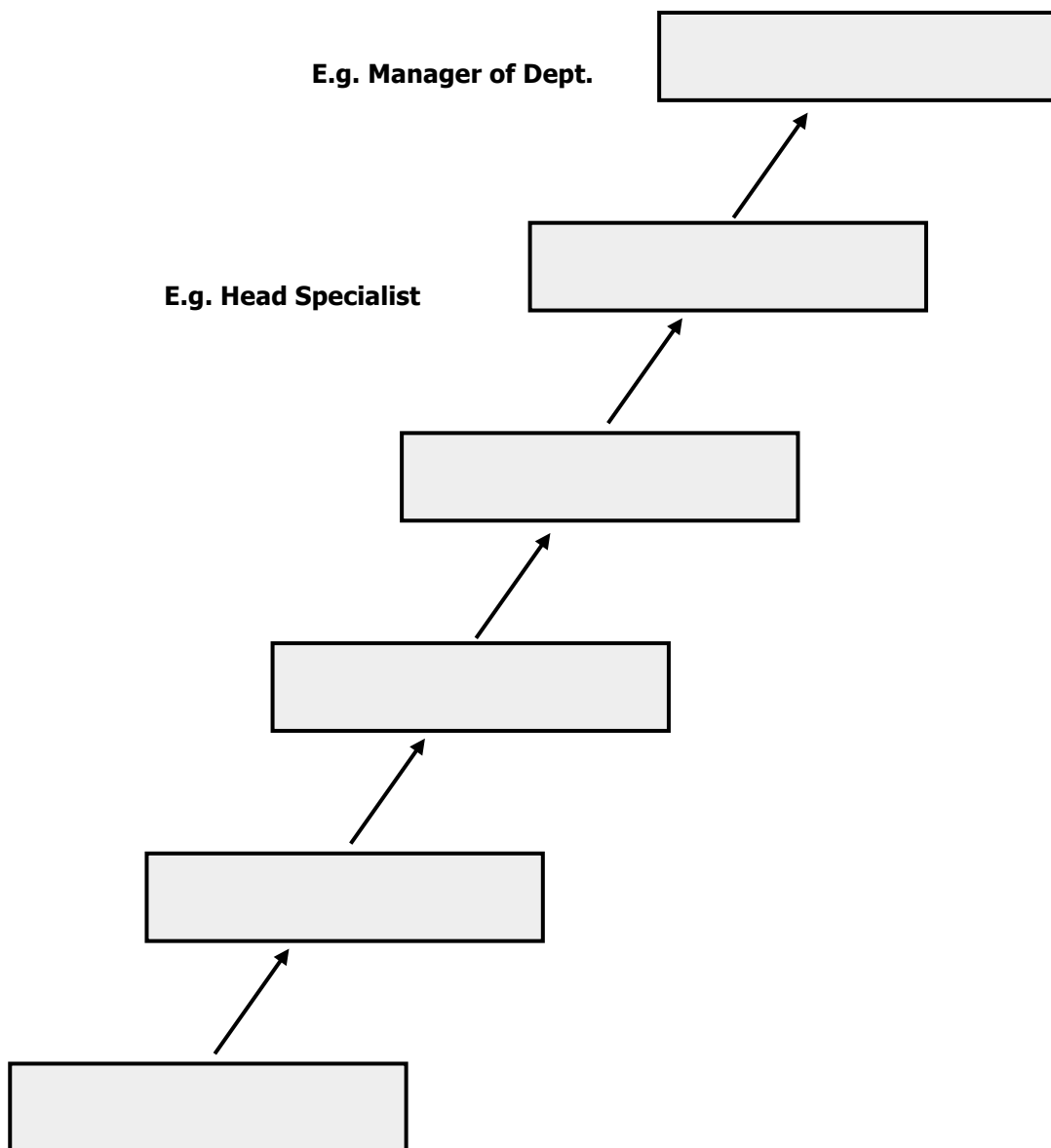
Secretary	
Function:	To assist the District Sales Manager for Denmark and Germany, with secretarial duties.
Region:	Denmark and Germany
Key Job Responsibilities:	Correspondence for the District Sales Manager Maintaining calendars in Sales Department. Back-up for receptionist. PR. activities. Staff activities. Maintaining HR files.
Employee Responsibility:	None.
Reporting Structure:	The secretary reports to the District Sales Manager for Denmark and Germany.
Personal Qualifications & Skills:	<ul style="list-style-type: none"> • Extravert, independent and good at sizing up any situation • Good team player • Excellent organisational and time management skills • Systematic, efficient and has a good sense of urgency • Fluent in both written and verbal German • Good social skills an advantage
Education & Experience:	<ul style="list-style-type: none"> • Educated as a German correspondent • Minimum five years experience as secretary • Excellent PC skills, preferably Microsoft Office • Experience with presentations
Critical Success Factors:	<ul style="list-style-type: none"> • Will go the extra mile • Achieve good relations with all sales personnel • Maintain a challenging environment
Main Assignments:	<ul style="list-style-type: none"> • Sales correspondence • Maintain customer & HR files • Presentations for sales of product 2) • Contribute to new Intranet, with regard to HR activities • Completion of job profiles

Form 1: Job Profile

Job Profile for (function):.....	
Name:.....Dept.....Date.....	
Function:	
Region:	
Key Job Responsibilities:	
Employee Responsibility:	
Reporting Structure:	
Personal Qualifications & Skills:	
Education & experience:	
Critical success Factors:	
Main Assignments:	

Form 2: Career Path

Career Path for Department **Date.....**
(E.g. Sales/Customer Service/Marketing/Engineers/Production/Finance/ HR)



Form 3: Employee Information

Employee Information	
<p>Name:</p> <p>Title:</p> <p>Regional Responsibility:</p> <p>Name of Direct Manager or Supervisor:</p>	<p>Employment Number:</p> <p>Department:</p> <p>Date:</p>
Key Responsibilities:	
Education & Experience:	
Critical Success Factors:	
Main Assignments:	

Checklist: Preparing Job Profiles

Assignment	Participants	Action and Person Responsible	Deadline	Status
Management meeting to discuss implementation of <ul style="list-style-type: none"> • Job profiles • Region split • Reporting structure • Functions • Assistance from consultant 				
Staff Meeting including information about job profiles				
Meeting with HR Manager to discuss <ul style="list-style-type: none"> • Qualifications • Skills • Education • Experience 				
Interviews with key personnel				
Completion of job profiles				
Approval by management				
Job Profiles handed out to all personnel				

10 Typical Questions Regarding Job Profiles

1. How long/short should a job profile be?

A job profile usually fills about one to one and a half pages, depending on the position of the employee (see Sample – Sales Representative). Job profiles for top executives or managers will most likely fill two to three pages.

2. How many key job responsibilities can an employee have?

There is no limit, however, one to six key job responsibilities is normal.

3. How do I ensure that the employees are motivated to use and update job profiles?

The most important thing is information. Keep the employees informed of the reasons for implementing job profiles and the benefits. The supervisors and group managers should also show an interest in keeping job profiles updated.

4. How often should the job profiles be updated?

Just as soon as there is an amendment to the function, otherwise every time there is a performance appraisal interview with the employee, which normally is once a year.

5. What are good critical success factors?

There is really no such thing as good critical success factors. The most important thing to remember is whether these factors represent success for the company and success of the individual employee.

6. Who should be responsible for these job profiles as a product?

The HR Manager or person responsible for staff affairs.

7. How detailed should "education and experience" be in the job profiles?

Not as detailed as a C.V. but should include education and experience from the last three jobs.

8. If a manager is responsible for the personal development of an employee, should this be included in the job profile and the actual training needed?

Yes, in the field "Employee Responsibility." The actual training needed and planned will probably be more appropriate to state in the performance appraisal interview form.

9. What is meant by "key personnel?"

Employees in important positions in the company and who are in turn valuable assets to the company. Also, employees who you feel have a certain amount of wisdom along with influence on the remaining staff.

10. Should car benefits or other benefits be included in the job profile?

No, this should be included in the employment contract.