November 19, 2014

CYA: Not just another acronym

Do you sometimes feel your supervisor/team leader:

- Gives you conflicting assignments/priorities?
- Doesn’t give you all the information you need to properly complete a task?
- Changes assignments midstream, or after you turn in a work product?
- Micromanages your work?

Do you often feel confused about your assignments and/or instructions after you leave a meeting with your supervisor/team leader?

Are you concerned this hampers your being able to do an outstanding job (and getting the associated rating?)

Agency and regional priorities change, and we all have to switch gears occasionally. While we should expect to get the information we need to do our best work, that doesn’t always happen. And, sometimes a supervisor feels pressured about a certain task or deadline, so naturally checks on it more often.

BUT, if these actions happen again and again, they could affect your overall job performance and rating. That’s why it’s a good idea to document them. Proper documentation will you help manage assignments and responsibilities, and could help you if your situation deteriorates.

How do you go about preparing good documentation? The more details, the better!

Following a meeting, conversation, or activity, don’t wait. While it is fresh in your memory, send an email confirming what you thought you heard, and what you will be doing. Such as:

Good Morning, Ethel,

We met this morning at 10 in your office and I understood you asked me to complete the following tasks by 10 am Fri Dec 10.

Update our branch calendar.
Prepare draft of We Care Briefing Sheet and put into concurrence for comments.

I will get these 2 tasks completed by 10 am Fri Dec 10.

Remember, while the email can be casual, keep your tone professional. These are a tool to help ensure everyone is “on the same page.”
Once you’ve sent an email to document a situation or conversation, print it and put in a file folder. You may choose to write additional notes to help jog your memory, such as: *Nancy Smith and Lucy Jones also in attendance, Ethel appeared to be upset and angry, etc.*

Sending emails such as this will allow both parties to confirm assignments and other details about the conversation.