# FUTURE
CONSIDERATIONS

THE
ACTION CYCLE

The Action Cycle is a tool that looks at how you produce results and satisfaction in an organisation, team or any context that requires coordinating effective action. When applied consistently, it drives high accountability and trust in a team. By viewing activity in terms of this simple cycle, people become more effective in working together by dramatically enhancing their capacity to coordinate action.

In addition, we suggest that by seeing work as a series of connected action cycles, we can bring a new perspective to organisational leadership, design, function and accountability. Seeing our day-to-day workflow in these terms can result in major improvements in quality and productivity, improved customer satisfaction, decreased project cycle time, and a major shift in the climate in which people work.

There are two people involved in the action cycle, a 'customer' and a 'performer' – who could be in the same team, different teams, different levels or even different organisations.

The customer is usually the person making the request (asking for something to be done) and is the end 'consumer' of the action. The performer is usually the person who will be undertaking the bulk of the activity to get the task done. We are using the word 'customer' generically here – it does not necessarily refer to customers of the bank – in most cases, customers are internal. We are all customers on some tasks and performers on others – regardless of hierarchy.
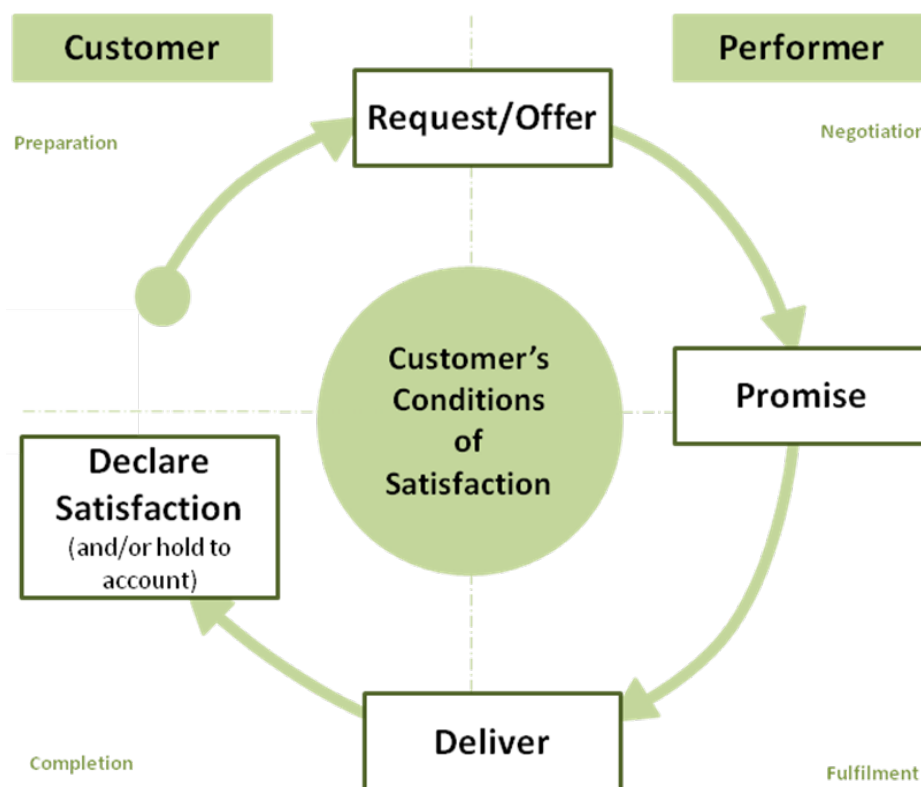
The 'Conditions of Satisfaction' at the centre of the model are those things which will satisfy the customer on the completion of the task. They are not always made explicit, but they remain the factors which, if not delivered, would leave the customer dissatisfied. One of the skills of a performer is to help the customer clarify their Conditions of Satisfaction.

The Action Cycle is initiated when a customer makes a request or a performer makes an offer. There are then four possible moves which follow:

Accept – "Yes, I'll do it by Friday."

Decline – "No, I won't!"

Counteroffer – "I won't do x but how about I do y instead?"

Commit-to-commit – "I'll let you know by Tuesday whether or not I can commit to this."

Implications

- Both customer and performer are co-responsible for any breakdown in the action cycle; it is always a shared responsibility regardless who appears to have made a mistake.
- Accountability is narrowed down to two specific people – there are no teams as performers, or committees as customers, in this approach.
- The definition of work changes from 'getting stuff done' creating products or delivering services – to satisfying customers. This highlights the importance of validating customer's needs before moving to action. It enables a performer to hold the customer to account for their commitments.
- There needs to be feedback from the customer on all work performed (which usually means that the customer needs to deliver an 'assessment' to the performer)

How to be an effective customer

Build your ability to make clear, direct requests

Example: "please will you complete the report for the board so that it provides them with the data they will require to make their investment decision, by close-of-business on Tuesday" rather than the ambiguous question "how's that report coming along?"

Identify the background, concern or larger goal behind your request. Is your request the best way to advance the larger goal? It is helpful to seek input from the performer here.

Example: if your request is to review the branch's customer satisfaction statistics, the larger concern might be 'we are getting feedback that customers are going to a competitor bank in this area because our customer service is inferior'

Distinguish between your Conditions of Satisfaction (COS), and how the performer produces them. Hold on to COS, but be open to alternative ways of producing them.

Example: if your request was to replace the file servers in the data warehouse, your conditions of satisfaction may be that the replacement is completed by the end of February and costs less than £100,000, but you may be flexible on what hardware or software is chosen. Conditions of satisfaction could include some of the following (please note this list is not exhaustive):

- Financial conditions – "This should save at least USD x"
- Resource conditions – "The solution should use no more than one person to complete the work"
- Quality conditions – "The solution needs to meet x, y and z requirements"

- Timescales for completion – "We need a draft by Wednesday and agreed proposal by Friday"
- Stakeholder/wider implications – "There should be no detrimental impact on stakeholders"
- Decision Making Process – "I want to ultimately decide on the outcome from at least two options"
- Communication/update frequency – "Please update me at least daily on progress"
- Escalation policy – "Please escalate to me if x, y or z happens"
- Level of Involvement/consultation required – "Only involve me when you have spoken to all stakeholders"

Clarify what the performer needs from you

Say, for example, "in order to fulfill this request, what sort of support will you need from me? What resources are you lacking?"

Budget time for status updates, and participate actively

Remember, performance is a partnership between customer and performer.

Declare satisfaction or dissatisfaction

Let the performer know if you are satisfied.

How to be an effective performer

Find out everything you can about your customer's goals, preferences, concerns, and hopes.

Example: ask "what is the context of that request? Why in particular is this important? What will really satisfy you if I do this well?" etc.

Meet your customer where they are. We often want to challenge requests from customers (particularly bosses!), but if they are not ready for you to challenge their requests, show that you can give them what they want. This builds trust and makes them more open over time. Then you can suggest alternatives.

Example: a new staff member to a team had some doubts about how the team leader led the team and delegated work. But rather than immediately challenging every request by suggesting an alternative way of doing things, she began by meeting the requests and doing good work, which meant that when she later started suggesting alternatives to the requests she was receiving, the team leader was more open.

Consider that you have two roles – to satisfy your customer, and to educate them on how to be a better customer. That second one is a long-term project.

Example: someone in IT gets requests from a senior manager which shows that the manager doesn't know much about computers! Short-term, the IT staff member responds directly to the requests, but over time, he shows the manager how to use the computer better themselves.

Exercise 1: Think of a current project where you are the customer or performer and that is not going as well as you would like.

- Identify the Conditions of Satisfaction as you understand them for the project (remember some of these may not have been spoken about).

- Now identify the customer and the performer.

- Write down what you think the customer should have done in the beginning and could do now to move the situation forward (this might be you!).

- Write down what you think the performer should have done in the beginning or could do to move the situation forward (this might be you!).

- Write down one next action you are going to take, given what you have seen doing this exercise.

Journaling: What you have learned about yourself as a performer and/or as a customer. What could you do better as a performer? What could you do better as a customer? How could this impact how you work with your team members to deliver results on the field challenge and business project.