

Leadership, Process Documentation, and Ice Cream: A Case Study

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Abstract

This paper seeks to understand the potential positive impact of process documentation and development on leadership practices, specifically in family-owned, retail, or food service businesses. Leaders face challenges such as clearly communicating the need for change, managing knowledge effectively, creating sustainable and realistic continuous improvement plans, and implementing better succession planning. Process documentation and development help improve upon these issues by defining processes and showing where improvements can be made and ensuring all knowledge is documented and organized for easy access, which helps both continuous improvement and succession planning efforts. Process documentation and development have a positive impact on leadership practices, as evidenced in the Green Oaks campground ice cream establishment case study.

Keywords: process documentation, process development, leadership, succession planning, coaching, knowledge management, continuous improvement

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Introduction

This paper intends to make a case as to why process documentation and development are helpful practices for leaders to use regardless of whether or not they are required. The case will consist of a description of some of the common problems leaders face and how process documentation and development can help improve them, along with a case study on a family-owned campground and ice cream establishment, Green Oaks Campground.

Through my literature review, I discovered that there is not a lot of research on the connection between process documentation and effective leadership. My hope is that this paper expands upon the limited knowledge in this area and inspires leaders to begin using these ideas to improve their practices.

Process documentation is the continuous activity of documenting the knowledge necessary to perform business activities within an organization (Guerrero, 2021). Process documents are the deliverables resulting from this, which describe the activities necessary for specific processes in detail (Guerrero, 2021). The information within each document must reach a balanced level of detail: comprehensive enough for inexperienced individuals to be able to complete tasks with, without the addition of off-topic information (Guerrero, 2021). Depending on the organization, this will be expressed in different ways. In the telecommunication industry, for example, processes are often documented through flowcharts.

Process development is the act of improving pre-existing processes (Hamm, 2016). Using new knowledge, the application of new technology, and removal of waste, variation, and constraints where possible, process development builds upon old processes (Hamm, 2016, p. 15). A long-term view focused on learning from failures and small, incremental improvements help large firms such as Amazon, Microsoft, and Toyota succeed (Hamm, 2016, p. 16). To lower

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costs and continuously improve, Hamm states that process development and strong leadership are crucial.

Literature Review

Leadership involves many behaviors and practices, but focuses on helping teams become more than the sum of their parts to achieve goals. Some of the primary differences between management and leadership are that leadership isn't formally delegated and places additional focus on follower relationships and development.

“...Managers are results-oriented problem-solvers with responsibility for day-to-day functions who focus on the immediate, shorter-term needs of an organization. In contrast, leaders take the long-term view and have responsibility for where a team or organization is heading and what it achieves” (Graduate Studies, Granite State College, n.d.).

There are many challenges associated with leadership, particularly relating to training, succession planning, knowledge management, and communication.

Coaching and Training

Though coaching and mentoring are often seen as one and the same, this is not the case. Mentoring is when an expert teaches someone everything they know. This limits what can be taught to only feelings or skills that the expert has already understood. “Coaching is unlocking people’s potential to maximize their own performance” (Whitmore, 2009, p. 10). Helping people overcome internal obstacles is one of the primary objectives for coaching. Instead of seeing people as how they perform currently, coaches must instead perceive potential (Whitmore, 2009, p. 14). Managers can become coaches, but they must focus on developing trusting relationships with their teams, not rely on external motivators such as raises, promotions, and threats.

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Though most people agree on the importance of coaching and mentoring within the workplace, some are unwilling to devote the time and effort necessary to do so. After analyzing the limited research available on the potentially negative effects of coaching, Erik de Haan concluded that the benefits far outweigh the drawbacks (de Haan, 2021). At worst, coaching fails to deliver a positive enough impact to make the effort expended worthwhile, as further reflection isn't necessary (de Haan, 2021).

Coaching and training are important within all organizations because they help employees gain the skills necessary to become more successful. Not only does this increase overall productivity, but improve self-confidence and motivation to continue putting forth good effort. A series of repeated randomized controlled trials (RCTs) on the impact of social entrepreneurship showed that training has a positive effect on those who participate in it, both directly after and as late as three years later (Astebro & Hoos, 2021).

There are many challenges associated with coaching in an organizational setting. Businesses are being forced to shift toward aligning their actions with the ethics they preach in their mission and vision statements, which is creating the need for cultural overhauls (Whitmore, 2009, p. 172).

Coaching is the most feasible method of carrying out these changes “Because a value-based future cannot be prescribed by some outside authority. Performance will always be at its best when staff, shareholders, directors, and even customers share the same values, but before that can happen staff need to be encouraged to find out what their own values are.” (Whitmore, 2009, p. 173).

It can be difficult for coaches to clearly communicate what needs to change and why, but it is crucial to do so to ensure buy-in from key stakeholders (Whitmore, 2009, p. 173).

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Literature that would add value to this area of study may include case studies or more detailed descriptions of how training tools are used to help employees. Though studies have been done, it would be helpful to see more real-world applications in the form of how businesses implemented coaching and training. Understanding the specifics of training tools may shed light on whether some are more useful than others.

The potential negative aspects of coaching should also be analyzed in greater detail, as there is a severe lack of published research in this area. “It is evidenced that in social sciences and psychology only around 20 per cent of ‘null results’ actually get published.” (de Haan, 2021, p. 12). Instead of questioning the validity of coaching when results don’t match pre-existing beliefs, there is a possibility that psychologists write off the experiment as misconducted instead (de Haan, 2021, p. 12).

A Case Against Coaching made some of the most profound contributions to the belief that coaching is indeed helpful by examining it from a critical viewpoint. Many authors appear to operate off the assumption that coaching is helpful, and while this may seem true, it’s crucial to take a step back and objectively determine whether this is actually the case or the result of longstanding (and perhaps outdated) opinions. De Haan’s careful analysis of literature in this area and conclusion that coaching does have benefits was strong because it involved discussion of the negative points he sought to find.

Knowledge Management

“Knowledge management has been described in a range of studies as the use of Information Technology to aid the collection and dissemination of knowledge, as the general process of acquiring and disseminating knowledge (Alavi and Leidner 2001), as

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the complex interaction and knowledge exchange between individuals, groups and organization (Small and Sage, 2005) and as the transfer of knowledge between organizations.” (White et al., 2018, p. 907).

Effective knowledge management has multiple benefits for both leaders and followers within an organization, and “has been discussed as a necessary core competence for modern organizations that seek to obtain and maintain competitive advantage” (Geiger, 2011). It helps employees make better decisions quicker because they have access to the right information at the right time. Knowledge management also helps them to feel valued and empowered to make the right decisions, as leaders are trusting them with valuable information instead of keeping them in the dark. Lastly, knowledge management promotes transparency across organizations. By having a comprehensive process documentation and development program in place, leaders have more knowledge to be able to share with their teams.

It can be difficult to transfer knowledge, especially soft skills such as communication, conflict management, and more, across organizations. This is because such knowledge is more difficult to quantify (White et al., 2018). Organizations that don’t keep track of their soft and technical information have difficulty transferring it when need be.

Further research should be done on the challenges associated with knowledge management in the business sector specifically, as the limited literature in this field focused on either strictly academic institutions or their collaboration with businesses. More insight on how softer skills and processes can be documented would also be helpful, as such problems are touched upon but not resolved in *Soft side of knowledge transfer partnership between universities and small to medium enterprises: Exploratory study to understand process improvement*.

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Soft side of knowledge transfer partnership between universities and small to medium enterprises: Exploratory study to understand process improvement added helpful information about soft skills vs. hard skills that was not present in other literature reviewed, but the focus of the study wasn't extremely relevant due to its university-business partnership aspect. Though The Business Case for Moving to ELECTRONIC DOCUMENTATION briefly touched upon a broad variety of points instead of delving into any specifics, each concept discussed was presented with logical reasoning and evidence to support the claim. The discussions pertaining to collaborative feedback and communication were particularly insightful. Because of this, I would consider the article an especially valuable resource.

Continuous Improvement

Though many organizations understand the importance of continuous improvement efforts, they find it difficult to continue them with momentum for long periods of time. "Social factors, i.e., organizational culture, leadership, employee engagement, efficient communication, are playing an essential role in the successful implementation of CI [continuous improvement] idea" (Trenkner, 2019, p. 128).

Though continuous improvement efforts are applauded across literature and known as something that requires extensive leadership dedication toward, the details of how to do either aspect are unclear. This is likely, in part, because of the extensive range of companies that use CI efforts: attempting to devise a plan that could accommodate a wide variety of businesses may be too general to be particularly useful to anyone. Further research on how leadership, motivation, and other social factors influence continuous improvement would close a gap as well.

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Succession Planning

Succession planning is a strategy to pass on leadership roles as smoothly as possible (Kenton, 2020). Preparing employees for leadership roles is important because it may lower recruiting costs, increase leadership continuity, and decrease stress levels during role transitions (Evans, 2016, p. 36). Ensuring that operations continue to run smoothly and are not disrupted by major leadership changes such as the introduction of a new CEO is extremely important for companies (Biggs, p. 106).

There are many obstacles to successful succession planning. Identifying measurable, objective competencies to determine what candidates have the highest likelihood of success is challenging (Evans, 2016, p. 37). Family businesses face extremely difficult decisions when it comes to succession planning, as all choices (training, information technology, human resources, etc.) are usually placed upon one person (Petru & Jakubikova, 2015, p. 70). Succession planning efforts made by this person are usually intuitive rather analytical (Petru & Jakubikova, 2015, p. 70).

“The knowledge transfer is essential for the future success or failure of the next generation of the family business. Therefore it is very important to involve the future successor into the operation of the family business as soon as possible in order to gain as much tacit (nontransferable, obtained by one's own experience and stored in the sub-consciousness of the company founder) knowledge in the field as possible.” (Petru & Jakubikova, 2015, p. 70).

Succession planning is a long-term, complex process that requires active collaboration and knowledge transfer (Petru & Jakubikova, 2015, p. 72). It is crucial to ensure that as much

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knowledge, both implicit and explicit, is transferred as possible so the next leader is able to make good decisions (Petru & Jakubikova, 2015, p. 72).

Process Documentation and Development

Process documentation and development have the ability to help overcome all of the leadership challenges previously described. Process documentation and development helps identify what changes can be made to improve in clear, objective ways, whether it be to become more transparent, ethical, or efficient. Documenting processes ensures that knowledge about all operations within a business is readily available, minimizing potentially lost information during succession. Strong leadership, organizational culture, and communication help enable continuous improvement efforts by creating a more supportive environment, which can be created with the help of process documentation and development (Trenkner, 2019).

My research question is “How can process documentation and development help leaders improve practices at Green Oaks Campground’s ice cream establishment?” The relationship between process documentation/development and leadership is relatively undocumented, so understanding how they benefit each other will provide another helpful skill for any leader’s metaphorical toolbox. Leaders working in areas such as project management will find this information especially helpful.

Framework for Analysis

Green Oaks campground is located in one of the bustling tourist towns of New Hampshire, abutting a river on one side and a fairly busy street on the other. There are three other ice cream shops within a five-mile radius, each offering virtually identical products at a similar price point. The focus of this case study will be on the ice cream shop, which is one room

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with two windows to serve customers. I chose to focus on how process documentation can resolve issues at Green Oaks campground's ice cream establishment due to my personal experience with the company and the value in communicating process documentation's relevance in this area. Though process documentation and development are helpful for any business, some industries require extensive documentation for safety purposes. Understanding the importance of documentation doesn't change the fact that either way, firms in these areas must accomplish it. Studying how this could help an ice cream place, which is a business that requires virtually no process documentation, demonstrates its value for food service, retail, and other industries that otherwise would not utilize these concepts. By beginning to understand how process documentation can resolve common leadership issues, leaders and organizations may begin implementing these practices more often.

Case Study

Though Green Oaks' ice cream shop is a profitable business, there are issues that, if resolved, would improve profitability and effectiveness greatly. A lack of trained employees, succession planning efforts, and standardization are currently the greatest challenges for Green Oaks ice cream.

Green Oaks ice cream has one worker run the shop at a time, with the exception of two to three during particularly busy hours: myself, and either my coworker, the boss's fourteen-year-old granddaughter, one of the camp site cleaners, my boss, or one of the two trained front-desk employees. The rest of the workers do not possess the skills necessary to help in an efficient manner, and two of the employees who do help with ice cream are unable to complete all tasks necessary to run the shop (i.e. making frappes, taking orders, using the register). A second

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employee doesn't help until the primary one calls them in during rushes or someone becomes free enough to help. This reactive approach results in excessive wait times for customers whenever the line exceeds about six people.

Training and Standardization

A lack of sufficient employees, either in number or skill level, is a common problem for many organizations. Harvard Business Review discussed the staffing issues for retail, an industry similar to food service, stores attempt to cut costs by giving employees less hours. Though this appears to save money, it often costs the business more in revenue than it saved in labor costs. "The better service provided by higher staffing is particularly important if a rival has a store a block away that customers can go to if they tire of waiting for an associate to help them in your store." (Fisher, Gallino, & Netessine, 2019). To optimize staffing levels, HBR suggests calculating how sales are influenced when employees fail to show and planning accordingly (Fisher, Gallino, & Netessine, 2019).

Equipping workers with the right knowledge is just as important as having the right number of workers at any given time. Zeynep Ton, doctoral student at Harvard and professor at MIT, analyzed a variety of businesses to discover what helps businesses save money by helping workers reach their fullest potential. Contrary to popular belief, raising wages is not the answer. Ton identified four major steps toward "good jobs":

- "Focus and simplify: Know the problems you are solving for customers, and make strategic trade-offs accordingly. Simplify operations to maximize value for customers and improve staff productivity and motivation.

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- Standardize and empower: Make routine processes consistent — with employee input — and give workers the power to improve those standards. Ensure your employees can make decisions that improve customer service and reduce costs.
- Cross-train: Build flexibility to meet variable customer demand by training employees so they can perform different roles. This means employees are busy even when there are no customers.
- Operate with slack: Staff shops with more hours of labor than the expected workload to meet peak customer demand and to give employees time to perform their tasks well and make improvements. This frees managers to lead, rather than fight fires.” (Good Jobs Institute, 2017).

At the core of the Good Jobs strategy is the belief that investing in people creates a virtuous cycle (Good Jobs Institute, 2017). Companies such as Walmart, Trader Joe’s, and Costco have used these strategies to increase employee satisfaction, improve efficiency, and cut costs. By viewing front-line employees as assets, not costs to cut, retailers are able to instill motivation and positive attitudes within their employees that keep customers coming back for exceptional service.

Green Oaks currently fails in every one of the aforementioned steps Ton describes as necessary to create “good jobs”. Processes are not standardized, customer wants and needs are never discussed, and employees are overworked and undertrained.

Operating with Slack

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According to ibisworld.com, the average number of employees at an ice cream shop is 8.7 (IBISWorld, n.d.). At Green Oaks, there are two workers, each running the shop on their own. Employees work alone and never with slack; they must constantly be watching either the window or security cameras to check for when customers are coming and face pressure when more than two groups of customers arrive at the same time. If one calls out sick, the other employee or boss must work excessive hours to ensure the shop doesn't close. For example, I came down with a cold this summer and had to take a week off. The other ice cream employee ended up working 52 hours to cover for me. When rushes occur, my boss sometimes had to step in and begin fulfilling orders, too. This frustrates her, as she would rather spend time on high level business activities than front-line work.

Pushing other employees to work excessive hours, especially when someone calls in sick, often makes those who used their sick days feel guilty and instead show up while unfit to work (are sick, injured, etc.). This increases the number of mistakes made while on the job and lowers morale. In an ice cream shop, it's especially important that employees don't come in sick, as coughing and sneezing spreads germs that may infect customers. When customers see these symptoms exhibited by the people preparing their food, they may become concerned for their health and begin buying from other shops instead. Coronavirus has exacerbated this concern severely.

Analyzing the impact on sales when an employee fails to show up is very easy for Green Oaks. Because only one employee works at a time, the shop doesn't open if they don't show up. My boss might choose to come in and serve customers herself while working front desk simultaneously, but sales will decrease drastically regardless of what mitigation actions occur.

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When the shop is understaffed during rushes, the shop's reputation for delivering orders quickly is harmed and customers may choose competitors in the future. Delivering the product within a reasonable time frame is important, as many customers have children and are excited to eat ice cream as quickly as possible. Waiting in line for more than ten minutes may cause buyers to contemplate whether going to a different ice cream place in town would get them better service and go there instead.

Process documentation would help fix this problem by identifying how long tasks such as scooping ice cream, making sundaes, and mixing frappes takes so that the shop can be staffed to handle rushes in a timely manner. If Green Oaks gathered information on what the average number and type of orders per hour looked like during different days or parts of the season, they could use process documentation to understand how many employees would be necessary to bring turnaround time within acceptable parameters. Giving employees slack would enable them to proactively manage peak demand while being happier and providing better service.

Focus and Simplify

To focus and simplify operations, organizational leaders must first have a clear understanding of their target customer. This includes easily identifiable information (i.e. age, gender, income) as well as more abstract ideas (goals, needs, wants, and insecurities). Once this information is gathered, processes can be analyzed to determine what activities create value for the customer and what can be eliminated.

Lean is a series of principles that focuses on creating value for the customer and removing unnecessary practices. The five main principles are defining value, mapping the value

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stream, creating flow, establishing pull, and pursuing perfection (Do, 2017). Do describes these principles as follows: Defining value involves understanding customers and understanding what they are want to pay for. After this is accomplished, the next step is to identify all activities involved in contributing to these values and deciding which ones are worth keeping. Tasks can be value-adding, non-value-adding but necessary, and non-value-adding; the latter is considered waste and should be eliminated to maximize value while minimizing cost. Processes should be tinkered with to remain smooth without wasteful activities, which is known as “creating flow”. The final two steps involve minimizing inventory and work-in-progress and striving for continuous improvement.

The Lean Enterprise Institute further deconstructs waste into three types known as the “three Ms”: Muda, Mura, and Mudi. Muda consists of activities that use resources without creating value for the customer. There are two types of Muda: type one Muda is any activity that can’t easily be discarded, whereas type two Muda can. Mura is unevenness in operations not caused by varying customer demand levels. Finally, Muri is “overburdening equipment or operators by requiring them to run at a higher or harder pace with more force and effort for a longer period of time than equipment designs and appropriate workforce management allow.” (Lean Enterprise Institute, 2021). Eliminating one form of waste often is intertwined with eliminating the other two.

Process documentation a crucial step toward implementing Lean principles, as waste in processes cannot be identified and subsequently eliminated without a clear, accurate understanding of the process. Process documentation supplies lean efforts with detailed, accurate information on what current processes are so that they can be improved. To focus and simplify

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processes at Green Oaks ice cream shop, Lean principles must be applied. This cannot be accomplished without utilizing process documentation. After deciding on what the target customer looks like for the ice cream shop, leadership at Green Oaks could begin working with employees to document processes and analyze what activities create waste. These wastes could then be categorized and eliminated so ice cream can be delivered to customers more quickly and effectively.

One example of waste at Green Oaks Campground is having employees work eight hour shifts alone. This would be classified as Muri because it involves putting excessive strain on people for a longer time than effective workforce management permits. To resolve this problem, upper management could determine what number of employees would minimize wait times while maximizing profit and change schedules appropriately. For example, two employees working together would be able to cover for one another if one had to use the bathroom or take a break. When rushes occur, having two employees ready to handle the matter would be more effective than the current method of having to wait for an employee from another department to become available.

Reducing waste would also involve reducing inventory as much as possible. Currently, Green Oaks has a large freezer to hold extra ice cream flavors, with anywhere from five to about fifteen in it at any given point. In the shop itself, spaces underneath tables and in corners are dedicated to housing spare napkins, toppings, and more. Refrigerated toppings such as whipped cream and cherries are within a large fridge in the shop. Reducing unnecessary inventory would give employees more space to work and reduce costs for the business as a whole. If these practices were implemented earlier during the shop's conception, the fridge and freezer

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purchased could have been smaller and more cost effective. Items with quick expiration dates, such as milk, would also be purchased as needed instead of in bulk to reduce waste.

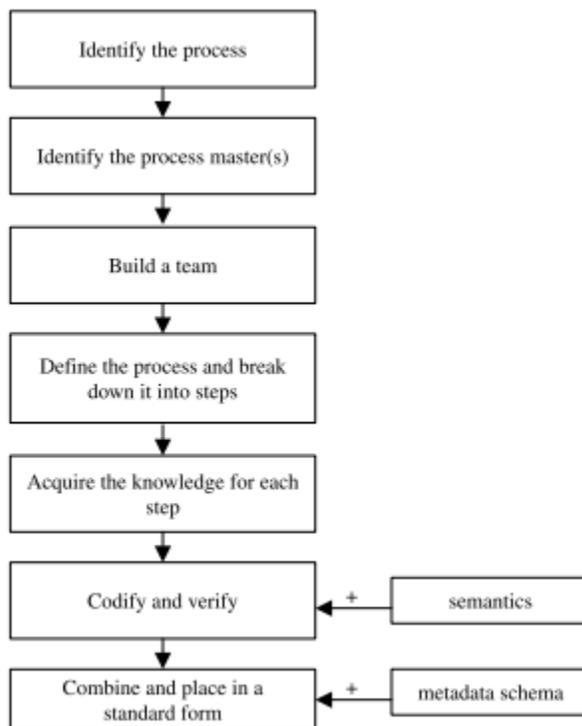
Standardize and Empower

Consistency gives customers a clear idea of what to expect from a business and is a foundation for why people become loyal to a particular business or brand. This is difficult to achieve because employees have different backgrounds, personalities, and experience that makes them think about and execute tasks differently (Ungan, 2006). If the best performers in a business's methods can be documented, their approach can be used to standardize operating procedures to be the best: minimizing variations and continuously delivering high quality products or services (Ungan, 2006).

The knowledge necessary to standardize processes is comprised of know-how, which is referred to as procedural knowledge, and information, which is descriptive knowledge (Ungan, 2006, p. 137). Making an ice cream cone is an easy way to demonstrate these concepts: descriptive knowledge is understanding what ingredients go into the ice cream cone (ice cream, waffle cone, sprinkles, etc.) while procedural knowledge is understanding how to make the ice cream cone (how to scoop, how to hold the cone so it doesn't break, etc.). Descriptive knowledge can be documented easily. Documenting procedural knowledge, also known as tacit knowledge, is more difficult because the most effective ways of explaining it usually involve interactive conversation and storytelling (Ungan, 2006, p. 137). Tacit knowledge can be further broken down into two sectors: "mental models, ideals, and emotions as cognitive tacit knowledge; and know-how to applicable to specific work as technical tacit knowledge (Alavi and Leidner, 2001)" (Ungan, 2006).

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To standardize processes effectively, artefacts (training tapes, books, etc.) must be created to capture knowledge and effectively distribute it to a wide range of employees (Ungan, 2006). Creating these artefacts is helpful because it gives employees the opportunity to clarify knowledge they forgot or misunderstood without having to consult a process master (Ungan, 2006). The standardization process is summarized as follows:



(Ungan, 2006).

Process documentation is crucial for standardization efforts because they rely on a detailed understanding of how to complete processes a certain way. Without process documentation identifying these steps, a unified way of completing tasks cannot be shared effectively with employees. Additionally, a lack of artefacts created by process documentation

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gives employees no way of relearning processes after the initial training. If they forget or new workers are onboarded afterwards, the knowledge will be warped or completely forgotten.

Utilizing the standardization framework above would help Green Oaks ice cream shop standardize processes to consistently deliver high quality ice cream to their customers. This would increase customer loyalty and make it easier to train new workers in the future.

The first step is to identify what processes can be standardized. Because the products sold at Green Oaks are not customized, the production of all ice creams, frappes, and sundaes can be standardized. Next, process masters must be identified. Because customers desire ice cream that is of a consistent size and timely, process masters should be whoever creates orders the most consistently the fastest. These workers can then be put into a team along with management to break the processes down into steps. The level of detail should be precise enough for a new employee with no experience to successfully complete an order without outside knowledge. Acquiring knowledge involves talking to process masters and writing down everything they know about each process. Finally, artefacts should be organized so that they're easy to access whenever an employee needs them.

Creating a documentation style guide ensures that artefacts are available for workers in the right place at the right time. Mulholland states that “when standardizing processes, you need to create a documentation style guide which everyone can follow whenever they need to document a new process. To do this, you need to do six things:

1. Meet with your team leaders to create a unified document
2. Choose a centralized platform to store your processes.

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3. Decide on a naming and tagging convention.
4. Settle on a consistent format.
5. Clarify universal language for the whole company.
6. Set requirements for every process” (Mulholland, 2017).

Along with creating standardized document formats, it is crucial that Green Oaks ice cream shop establishes consistent, easy-to-follow scoop sizing, an official shorthand for writing down orders, and comprehensive recipes describing how to assemble sundaes and make frappes. Though ingredient lists are already documented, employees without the tacit knowledge necessary don't know how much of each ingredient to put in these products. A guide for writing down orders also exists, but each employee disregards it due to its inefficiencies and instead has developed their own methodology. Combining the best aspects of each worker's strategy into one comprehensive order-writing language would greatly improve efficiency, as employees could know what order they need to complete without asking whoever wrote it.

The most effective artefact style for standardization at Green Oaks ice cream shop would be both an employee manual and posters throughout the shop. Posters to complete tasks such as making frappes, scooping to size, and assembling sundaes could be located in their respective areas: the frappe machine, the ice cream cooler, and the hot fudge and caramel dispensers. This way, employees wouldn't have to walk across the shop floor to see the information they need: it would be written in a series of simple steps and pictures right in front of them. An employee manual at the register would give employees access to

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more detailed information if they need it. Standardization would improve service and empower employees to solve problems without needing to consult a supervisor first.

Cross-Train

Cross-training introduces flexibility in an organization to meet fluctuating customer demand (Good Jobs Institute, 2021). Employees should understand how to complete both customer-facing and non-customer-facing tasks so they have something to do regardless of demand levels (Good Jobs Institute, 2021). Cross-training is most effective when it gives employees the skills necessary to operate effectively without inhibiting ownership and mastery of a particular area. Employees who specialize in particular areas feel connected to others with the same skills and are more motivated to serve customers well (Good Jobs Institute, 2021). Tasking employees with mastering certain areas also increases accountability. Workers who feel like they're in charge of a particular area will do their best to ensure it reflects upon them well and satisfies customers.

The previous two steps toward “good jobs”, focus and simplify and standardize and empower, work together to make cross-training possible (Good Jobs Institute, 2021).

“When there are fewer products to know and fewer ways to perform tasks, employees can more easily learn different tasks and shift between them. Empowerment lets employees use their judgment to decide which tasks to do when. Investment in People, by setting high expectations, motivates employees to do their tasks well. Fair wages and team-based performance pay support Cross-Train by creating equality and shared goals among employees” (Good Jobs Institute, 2021).

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Process documentation is a necessary part of cross-training because it makes simplifying and standardizing processes to meet customer needs possible.

Cross-training efforts would help Green Oaks ice cream shop significantly. There is currently no research on demand patterns at this organization; knowledge about when demand peaks and falls is only existent in the form of my boss's perspective, along with the ice cream employees. Instead of having founded research stating average customer levels during certain parts of the season or days of the week, Green Oaks relies on estimates based on past experience. As a result, the shop is currently not staffed to meet varying demand levels well. Cross-training employees in other divisions at Green Oaks would reduce the strain on ice cream employees and deliver ice cream to customers in an acceptable timeframe during rushes. It would also give employees in other areas of the business something to do when they aren't busy.

To cross-train employees at Green Oaks, creating a formal ice cream training process would be necessary. By doing so, both current employees who need to learn about ice cream scooping and future employees will develop necessary skills correctly. A formal training program would also teach employees faster than verbally explaining things in a disjointed manner, as training materials provide visual cues and information to easily refer back to.

A cross-training program teaching employees how to work in the ice cream shop should include understanding how to complete all tasks necessary to run the shop alone. This includes taking orders, using the register, making ice creams, sundaes, and frappes, and restocking items. Basic cleaning procedures and problem resolution should also be included. This way, if an ice cream employee is busy doing one task, they can direct whoever's coming in to help to do any task necessary without having to explain how to do it on the spot. None of the jobs are

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particularly difficult or require excessive skill, so the cross-training process should take no longer than one week. A process master would take employees undergoing training through the processes and inform them of where to find relevant process documents. If cross-trained employees choose, they could use their downtime to watch ice cream employees complete tasks and continue learning.

Cross-training gives employees tasks to complete regardless of demand levels without overworking them. Cross-trained employees who are given the opportunity to be “own” particular processes helps instill a sense of pride and motivate them to continuously put forth their best effort. Process documentation makes this possible by being the foundation for describing what best practices are to workers-in-training.

Succession Planning

Great leaders equip their teams with the knowledge necessary to surpass them. Succession planning is about identifying, acquiring, organizing, and storing the information necessary for a successor to replace the previous leader with minimal disruptions.

The concepts discussed in both *standardize and empower* and *focus and simplify* remain true for succession planning, except the focus is on providing leaders with relevant information. Family business-owners in particular face challenges during succession planning, as they’re often so focused on managing day-to-day operations that they fail to adequately plan how to communicate their vision and knowledge regarding the organization to their successor (Eisenberg, 2019). The knowledge and decision-making processes family business-owners perceive as common knowledge is often not known by their successor; failing to effectively

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document and communicate all relevant knowledge can result in conflict between new and old owners, cultural disruptions within the organization, or decreasing profits.

Succession planning efforts should begin as soon as possible within any company, as the process of documenting all relevant information can be time-consuming. Though efforts may appear to not be worthwhile at times, mitigating the risk of crucial knowledge being lost during a leadership transfer is crucial (Margarit, 2019). Gathering explicit knowledge (customer lists, financial information, etc.) is a matter of compiling information from years or decades of files. This can take a long time, but the process is relatively straightforward. Acquiring tacit knowledge is more difficult. One way to capture this information is to have an unbiased employee or consultant interview the owner about a variety of relevant categories (Margarit, 2019). Responses can be recorded and transformed into documents discussing concepts such as the organization's mission, vision, values, and more.

Knowledge is one of an organization's most valuable assets. Some leaders choose to hoard their knowledge and expertise to feel important and valued, but this hurts the organization as a whole. It's crucial that leaders document all relevant information for a future successor, including trade secrets and other forms of intellectual property (Margarit, 2019). Process documentation enables the transfer of valuable knowledge in succession planning efforts by providing a detailed description of how to execute important tasks.

At Green Oaks, the current owners have made little to no succession planning efforts, but are contemplating retiring within the next one to five years. Compiling both explicit and tacit knowledge for a successor to continue running the business smoothly would keep crucial employees loyal and provide the successor with what they need to succeed. Some examples of

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relevant information to document would be how and when to order new ice cream materials (ice cream, sprinkles, hot fudge, cones, etc.), what qualities to look for while hiring new employees, what the current vision for the organization is, and more.

Conclusion

Process documentation is crucial for creating an environment in which employees are motivated to work independently and consistently put forth their best results. It helps remedy common leadership challenges relating to coaching and training by simplifying and standardizing tasks for employees to understand how to execute best practices. The acquiring of tacit information is made possible through process documentation, which aids succession planning and knowledge management efforts. Process documentation also provides detailed information about processes which can then be analyzed to identify and eliminate tasks that don't create value for the customer. Without process documentation, organizations would not have the information necessary to implement best practices and retain the knowledge that helps them create sustainable competitive advantages. This is especially true for businesses that otherwise would not document information, such as food service and retail.

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