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THE LAB MANAGER CONVERSATIONS SERIES

Welcome to the Lab Manager Conversations series!

Over a period of several weeks, we spoke to lab managers and leaders about their roles and challenges. These conversations have been collated into a series of articles that will probably resonate not only with lab leaders, but those across other businesses as well.

While their pathways may have been somewhat different, all our respondents have clocked up well over 10 years of experience prior to their current roles. They also cover the spectrum of calibration, chemical, microbiology, electrical, inspection and environmental laboratories.

And although they were pleased to talk through their issues, by request we've changed their names to maintain confidentiality.

We hope you enjoy reading these conversations and hope you discover some useful insights within these pages.

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STAFFING

Getting staffing right from the start

One of the most time-consuming parts of a lab manager's role appears to be managing staff. Since this is such a core part of the role, we'll be examining individual elements separately.

No matter what kind of lab you lead, it doesn't function without human interaction. And the first step to finding people is usually through an interview.

During the interview process, lab managers need to find people who are competent but who can also fit in with the dynamic of the lab.

Matthew sits in on interviews to assess the technical skills of the applicant, leaving the 'soft' skills part of the interview to the HR representative.

"*I always ask about equipment they've used, deliberately using industry jargon that they'd only understand if they'd actually done that work,*" he said. "*If I mention a particular instrument that's used in a test and they look completely blank, that's a red flag for me*".

He's also keen to explore their knowledge of equipment by using hypotheticals.

"*Let's say you have a piece of equipment that's designed to measure temperature. Just because it says it can withstand the heat from a furnace, doesn't mean you should drop it into one! Knowing what you shouldn't do is just as important as knowing what you should*".

There's also the issue of experience. Lisa explained that most of her hires aren't new graduates. "*It may sound unfair but people from other industries and other labs are my preference. Most of my recent hires have been over 40 and most of our staff are over 45. Graduates can take a LOT of time to train. Because we're so busy, I don't have the time to get them up to speed*".

Noticing a gap

Several managers mentioned another issue they had experienced with new graduates.

Lauren shared that, "*Some of the younger people coming through aren't following directions or think they know more because they're recent graduates. And they also have fewer practical skills. Their knowledge is theory based and they struggle to apply this theory to actual situations. It can be really frustrating*" Matthew agrees – "*some of them have no common sense!*"

However, it's not all doom and gloom for new graduates.

"*The bonus of having younger people in the lab is their enthusiasm when they want to learn and grow and be part of the lab and the greater business,*" says Sarah.

"*There's a lot of positive energy that comes from that attitude which can be in contrast with the people who've been there a while. And for those just turning up and going through the motions. Because labs have people like that too*".

It's not just about technical skills

Lisa agreed that this new energy was a big plus and added that she was considering taking on a new graduate.

However, this would only happen when she had a person or mentor available to train them. This should ensure they get consistency of message.

"It's not really fair to turn them over to a series of people to train them. They'll have to get used to different training styles and ways of sharing information as well as trying to learn. Having a dedicated resource to show them the basics is the best way to begin. It's better for the staff member, the lab, and the business".

Once those basics were mastered, the mentor can show them other ways of doing things or leave them to discover these on their own. *"For example, you can cut and paste something in a word document using the mouse or you can use the control keys. Both work and get the same result but it's personal preference which one you use"*, she adds.

These Lab Managers all recognise that competence of people goes beyond just having technical skills. So, too, is understanding the limitations of your systems of training and assessing competence.

It's important to step back and take a "helicopter view" of systems of assessing competence and training staff periodically. This will help us determine if our systems are right for the organisation.

This idea of noticing gaps and looking at new ways of doing things to improve and address those gaps is fundamental to Quality. It's something that is required in both the elements of Personnel and Management Review of any of the ISO standards.

Learning to learn

There was a lot of discussion about the role of education. As well as theory, there is an expectation that graduates will arrive with the ability to think critically about what they're doing. However, it appears that not everyone arrives with these skills.

Chris doesn't have a formal induction process in his lab. And while the interview process gives him the opportunity to gauge the candidate's ability to think on their feet, he's looking for something more.

"You should be able to walk into my lab, pick up a procedure, follow it and get a result – if you can't that's a different problem! But I want them to be able to think critically. Look at what you've been asked to do and review its intent and purpose. Critical thinking is incredibly important."

And while he's happy for staff to challenge processes or procedures, he doesn't accept short cuts.

"Every part of the standard is there for a reason. And our processes and procedures are carried out against the standard.

So, if you're not following those, you'll need a very good reason!".

Evaluating competence

Chris' approach of not having a formal induction process in his lab may be OK. Putting our "Quality" lens over this approach might suggest that it's not really delivering an optimal outcome.

Chris is finding that his expectation of competence as a critical thinker but at the same time following a procedure is not being realised in his new hires. How do we deal with that?

While something like ISO 17025 does not specifically require an induction process, it does call upon a lab to have criteria for competence and evaluate whether the individual meets those criteria. And as we identified above, it's not just the "hard", technical skills that we need to consider in the competence package.

The soft skills of critical thinking and following procedures form part of that package. So, think about what criteria for competence you've set out for your staff. Ask whether they are as explicit as they should be.

Contractors only please

A common theme amongst the Lab Managers was their inability to find new staff. With a tightening labour market, there were fewer candidates available to fill roles.

For a small business, the time it takes to get people up to speed can be too much of a burden on already stretched resources. Covid has also increased the struggle when seeking new staff. In some industries, using contractors is a solution.

"Most people in this field have an ABN and seem to prefer to work as contractors. And that works out really well for me because as a relatively new small business owner, I don't have the capacity to hire lots of staff," explains Neil.

"Plus, I wouldn't have the time to train the people I need across the scope of tests my clients are requesting".

While this may seem an ideal solution, it's not always guaranteed to be a good one.

"I recruit through an agency. But sometimes the people they send don't have the skills they said they have. And this is obvious when you ask them to carry out a test and they have no clue! So, then you have to go back to the agency and get them to find someone else which is a waste of everyone's time".

There's also the balance of cost versus convenience. If the contractor is very expensive, labs may not be able to pass this onto clients and still remain competitive.

Making your needs known

Neil recommends that if you decide to go down the contracting path that you use a reputable agency with a good screening process. Plus, you should have a clear specification of what you need.

"If you're hiring for a particular job, have a really specific checklist for the agency. Tell them exactly what you're looking for. It will save everyone time and anxiety in the long run".

And so, we return to the idea of understanding what competence looks like and setting clear and complete criteria for competence. It's important to not only create that for your internal documents, but to also communicate those criteria to the recruitment agency.

Managing the flow

For small or newly established businesses, there may not be a consistent flow of work. If a new client suddenly comes on board, using contractors will get the business over the initial flurry of work and ensure on-time delivery of results.

And of course, since they're contractors, the need to 'manage' them isn't there.

Neil explains, *"they know they're employed for specific tasks or tests and just get on and do the job. The good ones also understand that time is money because they're also business owners. It makes them so much more efficient and makes me more likely to use them and recommend them again"*.

But as we know, it's not just about getting the job done; we also want the job done right, no matter who is performing it. So, make sure those competence requirements are also made known to your contract staff so that they understand exactly how their performance will be measured.

The final word goes to Chris: *"Remember, the labour market is tightening. It makes sense to look at simplifying and optimising your processes and streamlining training. Once you get people on board, you need to get them up to speed as quickly as possible."*

Just how we do that doesn't mean we throw out all aspects of our people management functions. Issues of competence still remain fundamental to providing a good service.

LEADERSHIP

Leadership and managing people

From onboarding new staff to encouraging existing ones, there's always something to learn about being a leader and people manager.

Of course, the style of management and interaction with staff varied, depending on the personality of the respondent. But there were some consistencies – expectations and trust.

Daniel: *"Creating trust is critical for a good leader. People need to be able to come to me with their issues. I have a consistent, measured approach when it comes to managing my people. I keep the rules very simple because in a sometimes-chaotic environment, this creates order".*

Lauren: *"I need to be able to trust my staff which means teaching them well. I let them make mistakes because I'm there to oversee, not micromanage. In my lab if you do your job and be an adult, you'll be fine. And that approach leads them to trust me too".*

Sarah: "*I empower my staff to find solutions themselves. My door is always open but want them to come to me with 'this is what I've tried and that didn't work, what else can I do' rather than shrugging over a problem.*

As a leader, I want them to have confidence to do it themselves and trust that I'm there as a back-up. And of course, I expect them to learn from their mistakes."

Learning from experience

When setting up his own business Neil came from a different place – *"I've had some bad managers in the past, so I used them as an example of how not to manage! I'm really mindful of treating people well"*. To him this means being direct, up front and setting clear expectations.

When you think about it, the 'expectations' part of leadership is something that is covered in ISO standards.

All of them feature requirements to define things like roles, authorities, and responsibilities. That 'definition' includes not only the 'tasks' people are asked to perform but other elements of activity and therefore competence that might be explicitly written down.

Why not personalise your lab's systems to encompass some of these things? Don't assume you're writing something to simply meet an auditor's preconceived ideas of the requirements. And from that, relationships of trust will follow.

Promoted to the role

Sometimes lab managers can be brought in from outside but often this is an internal process. This means that you'll now be managing people you were recently joking with in the tearoom.

We know that work friends are important but once you become a manager, these relationships must change. You're now privy to information that they're not, so you can't be as open as you were when you worked side by side. Plus, you'll be making decisions that will affect their jobs and their careers.

So that means making a conscious effort to decide how to handle those relationships because there must be a professional distance.

Lisa was fortunate. Her business has an excellent support structure in place which made the move seamless:

"I was mentored through the process and given the opportunity to develop leadership skills. With the support of the company, I did a Diploma of Management which taught me things like having STAR (Situation, Task, Action, Result) conversations and setting SMART goals".

Managing your changes

You'll also need to manage your own expectations and accept that relationships will change.

That doesn't mean you can't still have conversations about common interests – you haven't suddenly become a different person!

But sitting down with your team members and discussing what your being a manager will look like should help everyone feel more comfortable about the changed circumstances.

This will also give you the opportunity to gauge how individual team members are feeling about your promotion. Whether you've been promoted internally or been brought in from the outside, be prepared for possible issues.

Lisa: *"Some people may be upset that they missed out on the role. Others could become more stand offish or perhaps even ignore your authority. Having clarity right from the start should head problems off before they begin".*

Daniel has a slightly different approach: *"If you're going from peer to supervisor, try putting yourself in their place. Keep the relationship as similar as possible and move the boundaries gently. You don't want people to leave if they see your promotion as an issue. And this is particularly true if you're suddenly supervising people you used to report to".*

Giving up the familiar

While being promoted to the lab manager role is an exciting step it can also be a scary one.

Victor: *"When I got the job, I was so pleased! But then I was terrified! Because suddenly I had so much more responsibility. I didn't want to let management or my team down, so I was working so hard, 11-hour days, just to be sure I was across everything. I wanted to prove that I could do the job. Obviously, things settled down but for those first few months it felt like the world was on my shoulders!"*

While it's easy to hold onto those familiar lab activities you're most comfortable with, there will be things that only you as a manager can do. And getting clarity about your role as a manager is the first step.

Lisa got a very clear understanding of what the job entails: *"Don't make assumptions! I sat down with my boss with the job description and got really transparent statements about what I'm responsible for. And knowing that I'd be involved in more strategic activities gave me the* push *to train my staff to do the tasks I'd been doing because I knew I just wouldn't have time to do it all".*

That meeting is also a good time to identify any knowledge or skill gaps you need to fill to execute the job effectively.

Don't be the exemplar of the **Peter Principle** that people in a hierarchy tend to rise to "a level of respective incompetence". At every stage of your career journey, be brave enough to recognise that skills that were successful in previous jobs are not necessarily the only things you need to have for success in another role.

Managing takes time

Despite enjoying her role, the amount of time managing her team takes was surprising to Lauren.

"I knew there would be a focus on my team, but it took a while to get into a routine and a rhythm. Developing training plans, leave arrangements, team meetings, individual catch ups – it takes a chunk out of your day! Staff management probably accounts for about 30 percent of my work time", she said.

However, she believes those individual catch ups are extremely important. *"It helps to build a different level of trust,"* she explains. *"People can find it difficult to express what their issues are, not just at work but personally. But if they know they have a regular one-on-one with you, they become more comfortable about opening up. It's time well spent"*.

Taking a step back on where we might get some clues to do this, we could look to the fundamental principles of Quality and the need for an organisation to engage people. Whilst ISO 17025 and ISO 15189 might not be so explicit on this topic, ISO 9001 gives us some better clues to understanding this investment.

It asks an organisation to understand the needs and expectations of interested parties that are relevant to the quality system. Staff are an important interested party which is overlooked.

How should we engage with that interested party? Just like we might do with customers and suppliers we could do surveys. We could do an annual performance review. And we could take time out to develop a relationship built on trust by talking with, not to, our staff.

Each activity takes time and energy to bring about and as Lauren has experienced, there is value in the individual catch-up. This can be easy to say and difficult to do in a busy work schedule. But perhaps it comes back to our personal and organisational goals.

We need to define what is and what isn't important in life as a Lab Manager.

DEVELOPMENT

Staff development

This topic was high on the list of activities for good lab managers.

Of course, if your lab has NATA accreditation or certification with another body, your staff training records are something you'll need to show during an assessment.

These training records demonstrate where each staff member is up to in their learning and development and is evidence of an ongoing process.

Lauren sits down with her staff to work out a development plan.

"*This plan covers a 12-month period and it's done from a business perspective*," she explains.

"*We talk about what the lab will need and things like role development. But we cover everything including technical, personal development and leadership skills*".

Everyone agrees that 'soft' skills and leadership skills are now being more widely offered. This has opened opportunities for staff members while also giving them greater understanding of the management role.

As we touched on in the first article in our Lab Manager Conversations series, it's important to remember that competence does not just include the technical skills necessary to do the job.

Individual motivation

Sarah has regular catch ups with her staff but is more supportive of those who come to her with a plan.

"I want them to actively show up and demonstrate that they want to improve," she explains.

"These are the people I'm pleased to mentor and recommend for a leadership role. I've had a staff member put their hand up to do a course and then two weeks later they mention nobody has contacted them. And my response is - what did you do? Who did you speak to? Did you even follow up? Because to me that would demonstrate commitment whereas waiting for something to drop in your lap doesn't".

She's also a strong believer in self learning opportunities. *"There are plenty of opportunities to learn online. Our company provides free access to LinkedIn learning but even YouTube videos can give you some great information!"*

Matthew agrees: *"People can get information from newsletters, industry publications and company websites. Reading the information on your suppliers' website can be really useful. Even reading through an equipment manual can give you some insights!!"*

Sometimes you can't help

Chris noted that some people don't want to learn and grow, and you simply can't make them.

"There will always be people who just want to turn up, do their job and go home. However, the days when you were promoted because you were 'next in line' are long gone. Now there's no line and staff members need to prove their value to the business. And when they realise that's the case, well it can be a difficult conversation".

What if your company is known for promoting internally but brings in someone from outside to fill a role in the lab?

This happened to Lauren:

"It was such a problem because we had an employee who applied for a senior role in the lab and didn't get it. Since she'd been with us for a few years, she assumed this was just a formality and she'd simply move up the chain.

I'd spoken to her about improving her skills before she applied but she'd done nothing about this, done nothing to demonstrate she could step up into that more senior role.

She was shocked that she didn't get the promotion and even though I explained what she could do to improve her chances next time around, she ended up leaving".

Successful training

While everyone agreed that training staff was an important part of an efficient lab, there were several factors to consider.

Sarah: *"Choose your trainer wisely! Honestly, some people can do the job, but they just can't train. You don't just want people to follow the processes, you want them to understand the why and be able to troubleshoot as well".*

She added that external training was valuable.

"External training helps because they bring new ideas back to the lab and that helps with efficiency. It can also help break their 'this is the way we always do it so we can't change it' mentality," she added.

Lisa noted that training isn't a one-off activity. *"You can't just show them once and say off you go. You need to be sure they're clear and comfortable. And follow up so they know you have their back."*

While Chris is happy to support additional learning, there's something he wants from his staff first.

"Do your job. We don't have a formal process for requesting additional learning. And if you show interest and desire, I'll always help you. But first I want you to show me you can do your job effectively. And that's not just about performing tasks.

Are you applying your knowledge critically? Are you thinking about what you're doing? If I see evidence of that, I'm more than happy to help you progress."

All our Lab Managers recognise that improvement is not just a thing to do with the system. It comes down to a willingness of individuals to show not only do they have the technical skills to perform a task well, but lab improvement can also be a reflection on the type of people in the team and their appetite to improve personally.

So, when you're in the cut and thrust of an accreditation or certification audit, don't forget about these smaller improvements you've made to your lab ecosystem. It all counts.

Motivation

We've mentioned the time and cost involved in training new people so retaining employees makes good business sense. It's also disruptive to the workings of the lab if there's a revolving door of staff.

Naturally, people want to fair pay for their work and financial rewards are important. But this will only get them in the door, it won't keep them.

If someone has just joined your team, Daniel believes it's up to you to discover their stories. He tries to understand an individual's background and motivations to get the best from them: *"I use open, honest, planned discussions to facilitate this process. This way the person is more likely to buy in to any outcomes"*.

He also likes to create a flexible working environment as much as possible such as staggered start and finish times. If the budget allows other incentives such as financial bonuses or gift cards can be offered. But regardless of the format, it's the recognition of good work that's important.

Ask them the question

Management is nothing more than motivating other people

Lee Iacocca
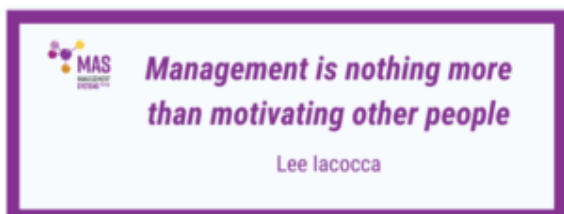
As a lab manager, understanding what motivates an individual is critical.

You need to know what they would see as a positive and would relish as a challenge.

Sending someone to a conference to present a paper may sound like a positive to you but to an introvert it could be their idea of hell!

Depending on the type of lab, extras or incentives may not be available. Semi government labs for example may be limited to offering flex time.

But that means more creative solutions can be explored.

"It doesn't have to be financial," says Daniel. *"It could be a company wide recognition programs, peer, or team programs. Public recognition is valued and valuable because everyone likes to be told they're doing a good job. Have a BBQ or similar get together to celebrate wins. This also allows for a different type of interaction. When was the last time you lined up for a sausage on a roll with the CEO? Or even better, stood next to them while you were both on BBQ duty!"*

Chris believes that the work itself can be motivating. *"In my lab, our work is aimed at helping people. The job you're doing is meaningful and assisting others. That may not be enough for everyone, but it's definitely a factor here."*

He also offers a different kind of financial incentive:

"I tell people that if you see an opportunity, do the work, and develop a new test to solve a problem, I'll give you a percentage of the profit from that test. So how motivated are you to do that work? Very few people are."

Keep them interested

Hopefully everyone has one thing about their role that makes them excited about coming to work. The only way to find out what motivates them to do a good job is to ask. This is particularly the case for high achieving staff members.

Lisa: *"Being able to recognise people that have a lot of potential is a benefit for them and for the business. Don't let them get frustrated. Offer to mentor them. Talk about their goals and expectations. Demonstrate how they can work their way up through the organisation. These are the people you want to have as part of your succession planning and growth."*

Despite your best efforts, sometimes good staff will think the grass looks greener on the other side. Chris says you have to let them go, but…

"One of my excellent staff members left for another lab and yes of course that happens. But after a few months of clock watching, dreary work and filling out time sheets, she came back. That grass wasn't so green after all!"

COMMUNICATION

Clearly communication is a skill all managers require. In fact, we've written about this before. It's critical to have clear lines of communication across all aspects of the lab.

"Little grass roots issues could lead to bigger problems if you don't get on top of them quickly," says Chris.

And this isn't just about interpersonal communication.

"We had a change in a process for a test we did infrequently. Since this is something we only do maybe once a quarter, nobody would remember or immediately recognise that there was a change.

So, we had to work out how to capture that information in a way that's logical and achievable for everyone affected. Deciding things as a team gives everyone a chance to be heard."

Lab processes and procedures are critical parts of your systems. In fact, they are probably the most critical because it is the output of these processes and procedures which delivers something to the customer. But giving team members the opportunity to have their say is more likely to ensure buy in.

While regular meetings with both individuals and teams seemed to be the preferred method of communicating, this isn't always an option.

Matthew: *"In a small lab, you're all so busy. We just don't have time to sit down and have regular meetings because we're just flat out. I think having good, simple systems in place is even more important in a small lab. When something changes or something happens, you know exactly where to find that information*."

Remember, having a meeting is not a requirement of any standard - effective communication is!

Wise use of time

Between management activities, testing, paperwork and liaison with customers and colleagues, everyone mentioned that time was their most precious commodity. Therefore, finding the best and most efficient way of communicating with staff was key.

Lisa: *"I have regular catch ups with my team members, so they know they'll have the opportunity to raise anything with me then. I just expect them to carry on with their work and not approach me with other issues unless it's urgent."*

Labs are sometimes part of a larger organisation which means that there will also be communication from other areas. Sometimes information from management can be confusing and it's up to the lab manager to distil this.

"If there are changes being proposed or implemented by management, this can lead to some anxiety among staff," explains Daniel.

"It's my job to put these changes into context and perhaps explain the background to the decision. That's why developing trust in the relationship is so important. They're relying on me for information and reassurance plus they have the opportunity to express their concerns in a safe place. It also means I gain valuable feedback to take back to management."

The key takeaways in terms of communication with staff was making sure it was timely and appropriate. Nobody wants to sit in meetings that could have been an email!

But for complex matters, choose the best method or mix of methods that work for your people. This could be a combination of a face-to-face meeting followed by an email summary of the discussion and any points raised.

Managing conflict

Like any other workplace, labs are a petri dish of personalities, needs, desires and ambition. And as a manager, it's your job to ensure this mix doesn't become volatile. All of our respondents agreed that this was their least favourite part of the role.

Lauren had an issue with a staff member speaking disrespectfully to someone else in a meeting.

"You can't let this go," she said. *"I was also aware of other comments that this person had made so I knew it wasn't an isolated incident. Getting this sorted right away is important. It sets the tone for the rest of the team and shows them what is acceptable and what isn't".*

Lisa uses staff surveys to obtain feedback.

"If a few people raise a particular issue around an individual, this can be a starting point for a discussion. This method means you're feeding information back to a staff member from other team members rather than an individual," she explains.

"People are more likely to give feedback this way, particularly if the issue is sensitive. Sometimes a staff member doesn't want to come forward because they worry about being singled out".

Naturally, everyone had their own approach in how they managed conflict but there was agreement that there shouldn't be a delay in handling issues.

In Daniel's words: *"Difficult conversations mean you do have to be sensitive but don't drag it out. Sometimes you just need to rip off the band aid."*

Finding agreement isn't always possible

Everyone agreed that despite all good intentions and intervention, sometimes there's only one solution.

Chris: *"If there's a deep-rooted dislike of another colleague, you're never going to break through that. You can't change personalities. The key is to catch it early and then hear them out in front of each other. Remind them it's a workplace and if you can't find a solution, someone must go.*

Having that conversation with them in the same room, face-to-face, means that they know you're taking this seriously. And that's particularly the case if this issue is impacting the business."

Matthew agrees: *"Conflict can mean that someone's needs or expectations aren't being met. And maybe that leads to them being disruptive. In a small lab, it doesn't take long for that to start influencing morale and output. So, you need to sit down and discuss that with them and talk about finding a way forward. But sometimes that just doesn't happen, and you have to be realistic.*

Sometimes people just don't fit it, won't fit in, or can't fit in."

Victor agrees with trying to sort it out but *"sometimes it just won't work. If they can't let go and keep being disruptive, you just need to make a change. If it's impacting the business this is particularly important. Because as a manager, your responsibility is to the whole organisation."*

However, if it does turn out to be a bigger issue driving negative behaviour, managers may need support to determine the underlying issue.

If an organisation has an HR Department, they can be called on to step in. But for a small business, an external organisation may need to be brought in.

What if it's you?

Dealing with issues between staff members is one thing. But what happens if that conflict is between the lab manager and a staff member?

Lauren: *"If it's a single incident, say they were confrontational during a meeting and it was part of robust discussion, I'd probably let it go. I mean, not everyone agrees with me all the time! But you can always get a sense if it's something more or part of an ongoing issue.*

If that were the case, I'd cut it off during the meeting and tell them we'll discuss this offline. Then I'd talk to them afterwards and ask what's going on – is there something they're struggling with? Is there something I'm missing?"

Brian says that it may not be you.

"They could have something not related to work and they're just venting. And look, we've all had issues at home that spill over. I understand that work isn't the only thing in their lives so I can overlook some things.

But if this is affecting how they work, then we need to talk about making a change, even if it's just for a little while so they can get themselves sorted."

Overall though, he's very happy with how he and his team deal with conflict. *"Maybe once a year something will flare up, but we get on top of it quickly and get it sorted,"* he says.

"Plus, we're a small team and we're so busy, we don't have time to be mad at each other!"

LEARNING

Ongoing learning for managers

While all our respondents put a high value on training for their staff, it seems that their own training and development tended to take a back seat.

So how do they keep up to date and their skills honed?

Matthew enjoys the use of technology to make his job easier.

"Back in the day (and actually it wasn't that long ago!) all the information was written down in a book. Now you can use an iPad or a tablet, take that with you on site and send those results straight back to the lab. Getting those results in real time has been a game changer. So right now, I'm really enjoying learning about different technologies and how they can help."

Sarah encourages staff to learn on their own and models this behaviour.

"Instrument suppliers are an excellent source of information and are happy to discuss how a lab can do things better or differently. The bonus of course is that they can potentially sell you some equipment! But you'll be surprised at the level of rapid innovation that's occurring that could benefit your lab."

She cites this example:

"Staff had been talking about how time consuming it was to prepare solutions. I remembered a conversation I'd had with a supplier about this, so I did some research and tracked them down. I found an autosampler for making calibration solutions and since it met our requirements, I put through the paperwork and requested it. It frees up a lot of staff time which is great.

Just goes to show what can happen when you have those conversations!"

Keeping up with the trends

Daniel stays current by reading trade journals and belonging to professional associations.

"Trade shows are also important to see what everyone else is doing. We often have a stand at these as well. In terms of more formal learning, I'm not sure what would be useful in my current role. Perhaps an MBA 'core skills' course or refresher could be helpful for people who have been in the workforce for a while."

Neil doesn't do any formal learning but instead is driven by his clients.

"If a client wants a particular test that I don't do, I'll research how to do it. As a small business owner trying to grow my business, it's in my best interests to go develop a reputation for finding solutions."

The take-home message with this is to understand that training and maintaining competence take on different forms. Just because you're not learning a new task in the lab, doesn't make it any less important. Sometimes reading an article (just like this one) is enough.

The critical piece is to record this somewhere in your system. And if your paperwork is too complicated for recording this kind of thing, then why not create something that better suits your needs?

A simple log or note in the calendar might be all that you need!

Networking

Opinion was somewhat divided about networking. Some saw it as very important.

"Networking done well is where you learn from other people," says Chris. *"Developing those interpersonal relationships gives you the opportunity to really find out what other people are working on. And sometimes that can lead to valuable collaborations."*

Matthew: *"I'm not very social so I tend to avoid those large gatherings. And with Covid there wasn't the opportunity anyway. I'm happy to catch up with former colleagues but I tend to avoid those professional association meetings. But now that you've brought it up, I feel like I should be making the effort!"*

Daniel attends events but it's not his preferred way to connect.

"As I get a bit older, I've lost a bit of confidence and desire to do it," he explains.

"Fortunately, I have extroverted business partners who are excellent networkers! They can lead the discussions and shake the hands which leaves me to be a bit more in the background to listen!"

A staff incentive

Lauren enjoys networking events but often finds she doesn't have time to attend.

"Sometimes I'll get one of my staff to go along in my place. As well as giving them the opportunity to interact, it shows them that I trust them to represent the lab and the business. Of course, they need to report back on what they learn and any insights, but I think it works well as an incentive."

Neil doesn't belong to any industry groups and doesn't network.

"This industry is VERY competitive, so unfortunately networking isn't valuable for me. I'd be concerned about sharing that information and losing clients. That might change as my business grows."

Finding your tribe

We agree, networking is not for everyone! It also sometimes has a bad name because of the expectation that you have to share everything you know and bring more people into the network, like some sort of pyramid scheme.

There are often business networks that lab managers and owners can be a part of. They might be location-based rather than attached to an industry or professional association. You don't have to schmooze with your competitors if it doesn't make you comfortable!

Let's face it, even in a government setting labs are businesses. Networking is a good tool for growing the pool of potential customers or learning new skills.

But if you have to force yourself to enjoy it, then it's probably not the best tool for you.

Time management

All our respondents agreed that time was their most valuable – and often scarce – resource.

While staff management was seen as important, setting boundaries seemed to be the key to getting work done. This was particularly the case if a manager was new to the role.

"If you're learning how to be a supervisor and they're learning how to interact with you, staying open to what they need is important," said Lauren.

"But you still need to be doing your job. So be really clear about your availability right from the start. Make your expectations evident. And if you've got time blocked out in your calendar, stick to it unless there's an emergency."

Because teaching and mentoring is part of her role, Lisa tries to incorporate this into her activity blocks:

"If I'm planning to show someone how to do a particular test, I'll block out time for them to observe while I'm doing it. The time this will take obviously depends on the test and the person, but it means I'm doing my technical work and training at the same time. Carving my day into time blocks is the most effective way for me."

A valuable resource

Time blocking appeared to be the most popular method for the majority of our respondents. However, for small business owners, this doesn't always work out.

"In your own business, you're always driven by the needs of your customers," says Brian. *"I may have intentions of doing certain things during the day but then in walks a customer.*

I often find myself coming in really early just to attend to tasks before the phone starts ringing or someone walks in. Because in a small business, you can't say no."

Of course, the issue of time as a resource is something that isn't mentioned in accreditation or certification standards like ISO 17025, ISO 15189, ISO 17020, or ISO 9001. The effect of poor time management and insufficient time often rears its ugly head through non-conformances, customer complaints and failing QC.

So next time you find something goes wrong, think about whether the root cause is because of lack of time. Then set about righting that by looking at Lean ways of working.

You can try incorporating multiple aspects of your role into a single activity block like Lisa. Or perhaps restructuring to allow people with more time up their sleeve to learn some of the things that take your time from you.

EQUIPMENT

Often a lab manager's role involves equipment management. Just like a car, equipment needs to be maintained so it's functioning properly and correctly calibrated.

Any perishable supplies or consumables also need to be correct and in date to ensure accurate results. And records of this will be reviewed during an accreditation or certification visit.

But no matter what the size of the lab, equipment can be an expensive investment.

Obtaining that all important tick of approval for new equipment or standards can be a bit of a process.

When presenting a business case to management, our respondents recommended putting yourself in the shoes of the person approving the expense.

Determine what they need to know to get your request over the line.

Demonstrating the value of the equipment is critical at this point. Include a spreadsheet, demonstrating how the equipment will help increase efficiency in the lab and cost savings.

In Lauren's lab, the system is a little different.

"The life cycle of equipment is already structured and set up through the purchasing section of the company," she explains.

"For example, the trace analysis lab has a lot of expensive equipment and that may need to be replaced every five years. That could take up a big part of the budget in that annual cycle, leaving only a little for other sections of the business. But because the process is so transparent, everyone knows they'll get a 'turn' as part of the budget cycle."

While the respondents all agreed that owning equipment is preferable, you could raise the possibility of leasing expensive equipment. This way the value could be demonstrated with a lower risk.

Once you have it…

Of course, obtaining the equipment is one thing. Maintaining it is quite another.

"I've had situations where I've been out on site and realised that a calibration frequency hasn't been updated," says Matthew.

"This means that I can't enter data directly into a spreadsheet on site. So, I have to make a manual record then enter it when I'm back in the lab. As well as leading to errors, this is very frustrating because it defeats the whole point of having the technology to do this on site in the first place!"

He's also relates the example of people using equipment that isn't appropriate for the work or the calibration is not current.

"Obviously this leads to downtime on test equipment. But it also means that if the equipment is incorrectly calibrated then the results are also incorrect," he said.

Considering the risk

Risk-based thinking is a focus across ISO standards. Incorporating this into lab systems leads to solutions and opportunities.

"We had a rather significant piece of equipment break down. We knew it would take a while to fix it and we certainly didn't have a spare sitting around," explained Chris.

"We'd already considered what we could do if this happened, so we put our solution in place. We contacted our clients and advised that we could use a similar technique on another machine during the repair period.

Although the results wouldn't meet the accreditation standard, they did meet the ISO testing standard. This meant that the results would be sufficient for them to make decisions. We offered to provide redefined results once the machine was repaired but it meant that our clients weren't at a standstill."

Chris also advised NATA of the breakdown and the solution that had been implemented. Now that the machine is up and running again, the next step is to make some decisions about whether that solution was a good one.

And of course, by keeping the clients advised, the company demonstrated both excellent customer service and communication skills. For a business seeking to differentiate itself from competitors, this can be a very strong selling point.

Staying safe

Before WHS and WorkCover requirements introduced mandatory requirements, people like Matthew found themselves in extremely dangerous situations on sites.

"I've had to walk through areas that I could see were dangerous and climb into high places without harnesses, undertaking testing without even the option of PPE," he recalls.

"Now that there's the possibility of regulatory bodies investigating a workplace and more awareness by staff of what's acceptable, there is more of a focus on safety equipment".

Lauren says that training staff plays a big part in lab safety.

"Regular reviews are super important. It's not just about reviewing their competence; this is also a good time to talk about safety and why they should follow procedures. Plus, it doesn't hurt to explain that we may have to recall results because they don't follow those procedures".

Brian's staff have just completed a training course on safety and compliance. Since they've all been so busy, he wanted them to have a refresher.

"It's only when we're under pressure to produce results in a hurry that there's a possibility of someone not following the process," he explains.

"It's important for them to understand the consequences of that. I got someone to come and do the course here so that everyone got the same message at the same time."

It's not just about physical safety

Covid and other challenges have demonstrated that businesses need to be across more than physical safety.

While labs know about putting safety systems in place for equipment, more are beginning to address the psychosocial hazards to their staff as well.

Sharon has recently completed a Mental Health First Aid training course.

"Management are aware that we need something in place to support our staff," she explains.

"They selected people from across the organisation to do the training and it was incredibly useful. I now have the tools to help my team and anyone else who may be struggling."

Depending on the size of the business, lab staff may also have access to the company's Employee Assistance Program (EAP).

This is a free, confidential counselling service to support well-being of staff in both their professional and personal lives.

Lauren finds that her regular catch ups with staff are useful for discovering problems.

"Those face-to-face meetings mean you get to know them in a different way," she explains. *"You can pick up if they're unhappy or if there's something going on. And they're more likely to trust you enough to express themselves more openly. I know it can be time consuming but those catch ups are valuable."*

Who knew? Caring about your staff's physical and emotional well-being helps managers to do their job well by uncovering what might be some of the things that hinder staff performance.

Staff are our most precious resource in a lab. Good Lab Managers recognise this and do their best to support their staff.

QUALITY

A common thread

Over the past six weeks, we've shared stories from lab managers about their roles. We've heard about their different experiences, [how they deal with people](#) and equipment management and other insights.

However, there was one consistent message that came through in these discussions. All our respondents valued and modelled the concept of <u>quality</u> in their lab.

Communication and culture can go a long way to understanding quality and how it impacts the organisation.

But people also need to know that carrying out their roles with a quality focus has a direct impact on the business.

"Quality Managers are task leaders," said Lauren. *"They don't have to do the task itself; they just need to make sure it's being done. It can be difficult for others in the organisation to understand exactly what the Quality Manager role is and why it's there*."

Demonstrating quality

Just talking about quality outcomes isn't enough. It appears that explaining to staff exactly what quality should look like in their everyday work is the key.

Daniel related a story about his time working in a business in China. Needing to overcome language and cultural differences, he created three simple rules. These gave staff guidance to help them in any given situation. The rules were:

- We live and die by quality
- Dates are important to us
- We can't fix problems we don't know about

One day a project manager came to him and said there was a problem with a piece of machinery and 1,000 faulty items had been shipped.

Before Daniel could react, the project manager went on to explain that he'd stopped the shipment, got people to work overtime to fix the issue then shipped again ensuring they'd meet the deadline.

"I went through a few emotions during that conversation," he laughs.

"But because he knew the rules, he did what needed to be done to meet the requirements of the business and the client. And got a great outcome."

This level of clarity meant that as soon as the project manager saw the problem, he knew he had to act. Three simple rules gave him the 'permission' he needed to fix the problem and implement a solution quickly and effectively.

And this doesn't just apply to your people. Daniel mentioned another business that had staff from their quality team regularly visit suppliers.

"They recognised that their suppliers' problems quickly became their problems. The quality team took the time to discuss issues with suppliers, help where they could and built a solid relationship. Supply chains needs to be strong, and this was an excellent way to ensure it."

While visiting and checking on suppliers may not be an option for all labs, building and maintaining good relationships with those suppliers certainly is. In fact, it reflects one of the principles of quality management in Dr W. Edwards Deming's 14 points:

"End the practice of awarding business on the basis of price tag.
Instead, minimize total cost. Move toward a single supplier for any one item,
on a long-term relationship of loyalty and trust."

Quality systems

All our respondents agreed that having a good quality system in place was critical. And this wasn't just for the purposes of compliance.

"Of course, we can be a bit more mindful of recording things because we know that they'll be checked during an assessment," says Brian. *"But the fact is, we'd need to have good systems and processes in place regardless. And they have to be simple, or people won't use them."*

A good quality system also ensures continuity. Staff members will come and go but with a solid system in place, your processes won't disappear when they do.

"Near enough is not good enough," says Chris. "*We have procedures and processes in place for a reason. We need to follow that line to both comply with the Standard and deliver good outcomes to clients."*

Everyone agreed that even the best quality system won't make any difference if staff aren't aware of it.

Changes may occur because of industry shifts or standard updates. Communicate these changes to staff through the most appropriate methods for the business.

This also allows staff to see that the system is dynamic and should reinforce why it's there in the first place.

In some cases, this may require one-on-one training particularly for newer staff members.

Since they're still learning about their role, this is a valuable opportunity to talk through the change and how it may affect them.

Supporting improvement

How does improvement happen within a lab? It's not just by having a policy that says you commit to continuous improvement! Again, communication appears to be the important factor here.

Leaders must encourage staff to ask the question 'what can we do to improve?' in the knowledge that their suggestions won't be ignored.

And putting them in charge of making those changes is very empowering.

"Everyone is expected to use the system we have in place to identify improvements," says Chris. *"Let's say someone identifies a nonconformance requiring a corrective action. That person leads the change process, and we all learn from it. They're given the responsibility to make the changes. That authority to act is a very important learning tool."*

A solid quality system also means you have checks already built in which allow everyone to identify those little gems for correction and improvement.

What might start out as something that is a problem could lead to a great leap forward in improving how things occur in the lab.

Activities such as checking calibrations, internal audits and carrying out maintenance give staff the opportunity to make sure everything is working properly. And staff must understand that if they do find issues, they shouldn't ignore early warning signs.

Correction and improvement are everyone's business!

Assessments can help!

While not a favourite activity, assessments by external bodies such as NATA can be beneficial. And feedback from Technical Assessors was seen as particularly useful.

"I've had some good discussions with the Technical Assessor and always get the feeling they're trying to help," says Brian. *"I know it's the accreditation body's job to come in and check if there are any issues but chats during the breaks can give you some great ideas!"*

As a lab manager who is also a Technical Assessor, Lauren agrees that this can be a great forum for discussions. *"Some lab people don't get the chance to network with their peers,"* she explains.

"Although they're not always thrilled about the assessment, they do value the interaction that can occur informally. Obviously, we can't give advice during an assessment, but we can talk in general terms about things we've seen."

The Final Word

All of our respondents were clear about the need for safety protocols. While safety is built into systems through processes and procedures, it's important to keep this front of mind.

"It's fine to share a joke and a laugh," says Sharon. *"In fact, without that, work would be pretty dreary! But labs can be dangerous. This isn't the place for fooling around and practical jokes."*

Clear guidelines including use of PPE, sample handling and testing procedures should be readily available. And regularly reinforce this through training.

Because the most important part of a Lab Manager's role is ensuring everyone goes home safely at the end of their shift.

We hope you've enjoyed our Lab Manager Conversations series as much as we enjoyed putting it together!

And don't forget, if you'd like to talk to us about how we can help your lab work better and smarter, please contact Maree (0411 540 709), Diane (0402 012 781) or email us at info@masmanagementsystems.com.au

Remember, you don't have to do this alone!