

Workflow: Operational Guidance and Execution**Toolkit 2.2****Staying on Course – Operational Review****target audience**

Farm managers and the farm management team.

what it is

Your operational plan is only the first step, and must be followed by executing that plan, while measuring and tracking your adherence to plan. The operational review is an important routine practice to ensure that you are staying on course.

For the purposes of this handbook, this toolkit emphasises the operational review as a regular event (usually monthly) at which a comprehensive review of the operation is undertaken. Staying on course links to and is supported by:

- Daily performance reviews – Refer to [Toolkit 2.4 – Daily Performance Review](#).
- Visual management – Refer to [Toolkit 2.3 – Visual Management](#).
- Administrative Excellence – Do you have the data and information available when you need it, and in the required format? Refer to [Toolkit 9.1 – Administrative Excellence](#).

The operational review meeting differentiates itself from the daily performance review meetings in that it focuses on a full month's performance, is more data and information driven (rather than activity driven), and looks at trends (month on month, year-to-date [YTD] vs plan, etc.).

why it is important

How do you know how well you are playing the game if you do not keep an eye on the scoreboard?

A good sport coach looks at both the scoreboard (the key performance indicator of competitiveness) and how the game is being played (other key measures of performance and best practice). Similarly, an effective operational review will be structured to provide comprehensive feedback and information, enabling an honest and transparent assessment (one version of the truth) of both operational performances against plan and the operational practices that drive performance.

success factors

The following are the most important components of successful operational reviews:

- **Regular and Routine** – At least once a month.
- **A Standard Agenda** – Ensuring that the operational items are all comprehensively included. Ensure that the agenda is appropriate to the operational review, and that items that should be dealt with in the daily reviews or within individual team meetings are not escalated unnecessarily to the monthly operational review meeting.
- **Inclusive** – All operational areas should be accurately represented, as it:
 - promotes inter-disciplinary communication and problem-solving.
 - allows for an element of peer review and challenge, i.e., promotes transparency, and reduces excuses for poor performance. Ensure that you promote a culture of fixing the problem rather than fixing the blame.
- **Complete Information, and Preparation** – All the information, data, reporting you need must be ready and available.
- **Efficiency and Professionalism** – Apply professional meeting management. Respect the agenda, respect the attendees, and respect time.
- **Communication and Follow-through** – Ensure that decisions are clearly documented (minuted) and communicated accurately.

execution steps

1. Schedule a regular operational review meeting at the same time every month.
 - Ideally, it should be as soon as the necessary management information of the previous month (accounts, records) is available.
 - Attendance should include the managers, departmental heads, and specialists, ensuring that all areas of operational accountability are represented.
2. Agree a comprehensive standing agenda, covering all key operational areas. (see the example agenda.)
3. Preparation is critical if you want to run an efficient and professional meeting. Reports, financial numbers, and other KPI information should be prepared and in a consistent format so that month on month and YTD comparisons, trends and progress can be assessed. The quality of the information is also important to ensure that everybody accepts “one version of the truth”.
4. Manage the meeting in a professional and efficient manner. Stick to the agenda, stick to time, and keep accurate minutes.
5. Ensure effective communication to the larger organisation of those points that have been agreed should be cascaded. To this end, accurate minutes are important (see the example template), and where necessary also agree on the communication script to ensure consistency.
6. Follow through by ensuring that a specific person is accountable for every action item. This should be clearly noted in the minutes so that progress can be monitored at each subsequent meeting.

assessment questions

Please Note: There is no minimum / maximum amount of questions you can add

1.	Do you hold a scheduled, monthly operational review meeting?
2.	Do the required people attend consistently?
3.	Do you have a set agenda for the monthly operational review meeting?
4.	Do you have the necessary information, data and reports prepared and circulated before the meeting?
5.	Do you maintain formal minutes of the meeting?
6.	Do you have a formal process to cascade information and decisions resulting from the meeting to the organisation?

resources

1.	Operational review meeting agenda example
2.	Operational review minutes template