# JRCI 8-Step Managerial Control Process Worksheet

Fill in each of the boxes with ideas and approaches you can use with your team.

| 1. | **Actively Seek candid feedback from all stakeholders.** |
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|    | *Define appropriate feedback objectives with all stakeholders. Speaking up is central for any control system to work correctly. What feedback will you require?* |

| 2. | **Implement objective and thoughtful controls.** |
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|    | *The information provided as inputs must be as objective as possible not to sway the results. What objective information for evaluation and necessary action is required?* |

| 3. | **Match controls and Plans to correct Positions.** |
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|    | *Information and data, combined with planning, are unique to departmental needs. What data must be included by the department for quality decision-making?* |

| 4. | **Demand and Maintain Accuracy in Reporting.** |
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|    | *Accurate data is essential for quality decision-making and planning. What can be done to ensure the accuracy of data inputs by department?* |

| 5. | Focus Attention and Efforts toward exceptions. |
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| | *Pointing data outputs towards exceptions is critical for control system success. What can you do now to draw attention to exceptions and deviations from desired outputs?* |

| 6. | Take Immediate action on deviations to get back on track. |
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| | *Once identified and verified, immediate action is required to correct the process or system. What must you eliminate to pour on the massive effort now?* |

| 7. | Once tested, Engage the Team and ensure organizational culture buy-in. |
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| | *Now the system is corrected, who must be notified of the new action required? What must be implemented to acquire the necessary buy-in?* |

| 8. | Implement Corrective action - Reward and Celebrate Accomplishments. |
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| | *How can we celebrate and build Momentum with this updated action?* |

*Working with many organizations in many industries, we have found equally as many errors in the control systems themselves as there is ineffective implementation of the system by poor managers.Therefore, as you identify techniques to use within your own team, make sure to just as carefully plan out your method of relaying the system to the team.*