**Implementation of the Mindful Business Charter**

**Guiding Principles for the Employment Department**

TS is committed to "*driving forward the actions and change necessary to support the Mindful Business Charter*".

**Implementation Table**

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| **Pillar 1: Openness and respect: building trust and effective communication**  |
| 1. **(MBC)** Discussing upfront with my colleagues, clients and contacts their preferred method of communication and clarifying any relevant implications of an individual’s working patterns
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| * Discuss team members' preferred working style, working days/times and channel(s) for communication and try to accommodate these where possible. Those with specific preferences may wish to fill out a "Team working styles overview" template in the form at Annex 1.
* If appropriate, discusswith clients and other external contacts (such as counsel) their preferred working style, working days/times and channel(s) for communication, as well as the working patterns of the Travers Smith team.
* Check in with team members and clients/external contacts periodically as to their preferences; individuals' circumstances may change or the approach may need to be adapted (e.g. during busy periods).
* Individuals with non-working days or fixed hours may want to state so in their internal email signature.
* Out of office automated replies should be set for:
	+ Any period of annual leave (including half days)
	+ Non-working days
	+ Non-working hours, e.g. if an individual has a fixed hours arrangement
	+ Any period where the individual will not be contactable, e.g. Tribunal hearings, lengthy meetings or time out for personal appointments of more than a couple of hours/non-negotiable personal events
* Out of office automated replies should state:
* The period of absence
* Whether the individual will be contactable during the period of absence (individuals should not feel obliged to state they will be contactable, but should of course periodically check their emails)
* PA contact details (and PAs should be asked to check work emails during periods of absence)

When emailing internally about annual leave/time out of the office, individuals may want to state that they will be trying to stay off email, but include a mobile number for urgent queries. |
| 1. **(MBC)** Treating internal colleagues and external contacts with the appropriate level of respect and courtesy
 |
| * This is hopefully a given.
 |
| 1. **(MBC)** Asking for and providing feedback to others on a regular basis**.**
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| * Giving feedback is encouraged (including 360 degree feedback).
* Team members should ask individuals for their preferred method of feedback and individuals at any level should feel empowered to ask for feedback.
* Feedback should be focussed.
* Some suggestions as to ways to give feedback:
	+ diarise time for feedback, e.g. after a client call on a particular workstream;
	+ when returning work, include comments of a general nature as well as specific edits or phone ahead to give oral comments with written changes following by email;
	+ mark up documents whilst screen sharing with the original drafter (or in person, if possible) and talk through why certain changes are being made;
	+ acknowledge contribution to work when referencing work product (e.g. in team meetings); and
	+ on larger workstreams where there are regular internal meetings, diarise feedback/de-brief sessions to consider things like: *What went well? What might we have done differently?* *What was a highlight for you since the team last met? What was a low?*
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| **Pillar 2: Smart meetings and emails** |
| 1. **(MBC)** Allowing people to join meetings by the method they deem suitable, providing dial in details as default on meeting invites unless it is imperative that everyone attends in person.
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| * The working assumption is videos on, but it is accepted that sometimes this may not be possible or individuals may need a break from screen time.
 |
| 1. **(MBC)** Being respectful of others’ time by planning meetings properly (considering who needs to attend / giving appropriate notice / setting clear agendas and objectives) and avoiding last minute cancellations.
 |
| * All team members' time is equally valuable.
* Keeping calendars up to date will help us be respectful of other people's time.
* Calendars should be checked before scheduling calls/meetings and before calling colleagues on Teams. The default assumption is that if someone has blocked out time in their calendar then they are not available during that time (although team members can of course check with each other whether things can be moved to accommodate client needs).
* Flexible working is encouraged; this might mean scheduling appointments or other non-work activities during the working day and individuals are trusted to exercise the judgment in this respect.
* Blocking out short breaks during the working day is encouraged (accepting these may need to be moved).
* Use of the department calendar (EMP WOO) to log times when individuals are on holiday, at work conferences or otherwise unavailable is encouraged. For example, this might include:
* annual leave (suggested entry "[Name] on annual leave from [date] to [date], contactable via [email] / [mobile]");
* tribunal Hearings or conferences/seminars;
* "non-negotiable" personal events.
* Things to think about when scheduling meetings:
* how long do you need for a meeting - don't schedule 30 mins if you don't need 30 mins;
* consider scheduling meetings for 5 past the hour or 25 to the hour to give space between meetings;
* consider whether a meeting is actually necessary.
 |
| 1. **(MBC)** Avoiding over-use of email and not copying people into emails that they don’t need to receive.
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| * Think about who needs to be copied on which emails.
* Where there are action points for particular team members in an email, use the @ function to draw those action points to the individual's attention.
* When seeking information or instructions from the client, consider summarising the action items as bullet points at the top of the email.
* Consider using Teams for chat that need not be an email, e.g.: "Thanks – That's helpful"; "I'll look at this tomorrow", in order to reduce inbox traffic. Alternatively, if using email, it is fine to respond only to the sender (even when external) when sending brief acknowledgments / thanks.
* Balance Teams calls, Teams chat and emails for keeping in touch.
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| 1. **(MBC)** Making use of subject lines in emails and ensuring these are reflective of the email’s content.
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| * Signpost at the beginning of internal email subject lines, e.g.: (FYI only) or (For review today).
* Ensure internal and external email subject lines are as informative as possible, e.g [enter matter name] – Draft Particulars of Claim for client review. If an email subject line ceases to be appropriate, feel free to amend it.
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| **Pillar 3: Respecting rest periods: Consideration given to the need to 'Switch off'** |
| 1. **(MBC)** Where support is required outside of someone’s core working hours, giving them options for when that could be (early morning or evening / weekend).
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| * Core working hours are 9.30am to 5.30pm. It will often be that team members are working outside these hours, but team members should not feel pressured to schedule calls/meetings outside these hours (accepting that sometimes this will be necessary).
* Consider using "delay" on emails so people don't get emails out of hours unnecessarily[[1]](#footnote-1).
* If an email doesn't need to be responded to outside core working hours (internal or external) then it's fine to wait until the next day to respond.
* Think about whether a call to a colleague needs to be made outside core working hours or whether it can wait; consider sending email or Teams message first to check availability (NB green light on Teams doesn't necessarily mean someone is online and working).
* Weekend working is not the norm, although sometimes may be necessary or an individual's preference depending on their circumstances.
* Ensure that junior team members have good visibility of a matter, short-term and long-term, to help them to organise their workload and rest periods.
 |
| 1. **(MBC)** When sending emails outside of business hours, being clear in the title whether it needs to be read / actioned promptly or considering sending pre-timed emails (so emails are not received late at night and at weekends).
 |
| * See Pillar 3, part (a) above.
 |
| 1. **(MBC)** Including working hours / availability as part of my email signature, so people are aware of each other's working patterns.
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| * Guidance on how to reflect your working hours/availability in your email signature is available at Annex 2.
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| 1. **(MBC)** Respecting people’s right to take annual leave without the expectation of them checking emails / being on call, and role modelling the same behaviour myself where possible.
 |
| * When someone is on holiday, consider whether it is appropriate to continue to copy them on emails.
* Do a thorough hand-over of live matters before going on leave insofar as possible and begin any handover in good time before going on leave – speak to Partners/Associates in advance to discuss who you can hand over to.
* Try to handover sooner rather than later so there is time for other team members to ask questions/get up to speed.
* Ask your PA to monitor your emails whilst on leave and text if anything urgent comes in.
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| **Pillar 4: Mindful delegation: Implementing a best practice approach to collaboration, instruction and delegation**  |
| 1. **(MBC)** Respecting the need to provide sufficient context and information for a piece of work, ideally including the purpose and ultimate recipient.
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| * If there is any concern about calls looking "over-lawyered", remember time can be recorded to a non-chargeable matter code. This can be explained to the client at the start of the call when introducing everyone.
* Giving context helps effective delegation; the purpose of a piece of work should be provided in advance, but if this is not possible, context should be provided later.
* Delegation should include setting an expectation as to the extent to which an individual is expected to "run with it" / the extent to which the delegator wants to be involved. It can also be helpful to highlight to the person you're delegating to whether they can involve someone else in all or part of the task (e.g. a trainee or sometimes a PA for more admin based tasks).

 * It is important to assess an individual's level of experience and involvement in a matter when delegating a piece of work; delegation styles should be flexed accordingly.
* Consider explaining why something is being delegated to a particular person (particularly when that person is already busy or it's a more junior task (e.g. capacity, experience etc.))
 |
| 1. **(MBC)** When instructing on a task, negotiating rather than imposing a deadline, being transparent where possible on the wider timetable, and promptly communicating timing changes which impact others.
 |
| * Check whether the person to whom a task is being delegated has capacity/availability to do it.
 |
| 1. **(MBC)** When being instructed on a task, being confident to flag when a deadline is unrealistic and / or unachievable.
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| * It is important to flag over or under-work to the matter partner. The partner group discuss capacity and work allocation every week and the more they know, the more they can try to balance workloads.
* It is useful to consider periodically when the team on a larger matter may need to be expanded and to take steps to do so before team members become over-stretched.
* Where possible, discuss with the client what workstreams/tasks are upcoming to reduce the risk of unexpected urgent work.
* When agreeing timescales with the client, the senior members of the team should involve the more junior members of the team (who are often doing the day-to-day work) in assessing what is realistic.
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**ANNEX 1**

**Employment department working style preferences**

|  | **Working patterns**  | **Communication preferences** |
| --- | --- | --- |
| **[Enter name]** | * Include details of:
* Non-working days
* Fixed hours arrangements
 | * [Insert communication preferences (if any) e.g. "I generally start work early in the morning" or "Please drop me a Teams message to check availability prior to calling"]
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**ANNEX 2**

**Reflecting your working hours/arrangement in your email signature**

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| **How to customise your default email signature**To customise your email signature find **Xink** on the Windows task bar (bottom right of your screen), **right click** the icon, and **select** "My contact details".**What part of my default signature can I customise?**

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| --- | --- |
| ☎ | Show or hide your **DDI**DDI is your Direct Dial In telephone number. This will be included in email signatures for most people. However there are some roles where it is not appropriate to show a Direct Dial Number. |
| 📲 | Show or hide your **Mobile Number**This option enables you to show or not show your mobile number. On roll out, mobile numbers have been removed from the majority of email signatures within DR as a default starting position. You can override this via the self-service option but please follow departmental guidelines unless there is an exceptional need. |
| 🕰 | Include your **Working Pattern**This free text field enables you to include details of your working pattern. Our aim is to help you protect your non-working time while helping to manage the expectations of those who you work with. This approach also aligns with the key principles in the [Mindful Business Charter](https://traverssmith.sharepoint.com/sites/HR/HealthWellbeing/SitePages/Mindful-Business-Charter.aspx) that the firm is committed to implementing. You might want to write something along the lines of:* "Please note that I do not work [e.g. on Mondays / after 5pm on Fridays etc]"
* "Please note that I work a 4-day week, with [Monday] as my non-working day"
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**Still need an alternative signature?**If you have previously created an alternative email signature in Outlook, hopefully the new self-service options available to you in Xink mean you will not need an alternative email signature. However, if you do, please take a copy of 'TS Xink Primary' and use this to recreate your alternative email signature (remember to delete old signatures).**Email signature when sending from your mobile**By default there is no longer a signature set up on your iPhone. To add one: * Using your mobile phone, navigate to the email that has been sent to you with your signature. Subject should read: Name, here is your iPhone email signature. It has come from TechSupport. (Please click on the button below to request a new iPhone signature if you cannot locate it.
* Copy the signature
* Navigate to the settings in Outlook
* Scroll down to signatures
* Paste the signature and test by sending an email to yourself. Please then check this on your surface pro.
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1. IT training to be arranged [↑](#footnote-ref-1)