HEAT MAP
A GUIDELINE

LINE MANAGER
TOOLKIT

TOOL **WHAT IS A HEATMAP?**

A heat map is a graphical representation of data/information where the degree/status of a factor is represented by a colour. Heat maps make it easy to visualize complex data and understand it at a glance to facilitate easy decision making.

In the people management domain a heat map is a useful single reference document used to track and monitor the current status of individuals against predetermined factors to identify areas where they are coping and areas where they require support. The tool can also host the agreed support plans devised to address areas of concern.

The heat map should be developed in partnership and conversation with individuals. It is also important to note that the heat map is not intended to be a performance management or diagnostic tool.

The heat map is of particular use during times of uncertainty and persistent change, (e.g. the Covid-19 challenge). During these times circumstances change continuously, and therefore it is prudent to assume that how leaders deal and cope with these circumstances will also change frequently. The heat map is a useful tool to keep track of where people are at (psychologically, performance wise, and as leaders) at a particular point in time in order to identify appropriate action and support needed at that time.

INFO **WHAT IS THE PURPOSE AND VALUE OF A HEAT MAP?**

- ☐ The heat map is a single reference document that contains easy accessible, relevant, and up-to date important information
- ☐ Used correctly the heat map facilitates conversation around the status of individuals against predetermined factors to identify areas where they are coping and areas where they may require support
- ☐ The components included in the heat map ensure that all relevant factors are considered in the discussion, and not just work performance (i.e. psychological well-being, work outputs and leading others). Refer to Addendum A for some example questions to help you measure these three factors as part of a conversation
- ☐ The ultimate purpose and value of the heat map is that it is used to identify (in partnership with individuals) where support is needed; therefore a support planning component is included in the heat map
- ☐ The collective interpretation of everybody included on the heat map will facilitate easy identification of bigger trends and patterns which may require higher level / escalated support
- ☐ The purpose of the heat map is NOT to discriminate against individuals who are struggling, or incite gossiping or blaming. Information within a heat map should be treated with the necessary sensitivity and confidentiality.

☐ Important: The heat map is not a diagnostic tool and should only be used to track the status and individuals and host agreed support plans
☐ Important: The heat map is not designed to be a performance management tool.

DISCUSS   HOW TO USE THE HEAT MAP

1. **Agree on the heat map template**; i.e. what and who will be monitored and tracked. Adapt the excel spreadsheet with the agreed columns and lines (a starting point template is provided to assist with this, see Addendum B for example.)

2. **Agree on the heat map colours** and ensure that the interpretation of colours is collectively understood. It is advisable to use the thermometer concept as there are already clear guidelines on the interpretation of the colours used in this tool (refer to Addendum C for an example and the thermometer guideline for further detail).

3. **Agree how the heat map will be completed and maintained**:

   a. **Who is responsible / accountable for the heat map?**
   It is advisable that the Line Manager of the individuals remains accountable because individual performance and engagement are ultimately the responsibility of the direct Line Manager. Other senior managers and/or the Human Resources representative can offer useful support with the updating / maintenance of the heat map.

   b. **Who will participate in heat map tracking conversations?**
   This will depend on the situation and preference of the leader and team. To prevent the heat map from relying on individual perception it is advisable to include team members (either one-on-one or as a team) in the conversations. Other senior leaders, HR Representatives and Organisational Effectiveness Specialists can also be included in these conversations where relevant / appropriate.

   c. **What other information will be considered when updating the heat map?**
   To prevent heat map information depending solely on perceptions, other information such as feedback from team members, etc. can be used included. When interpreting information and responses from people it is important to be mindful that emotion, personality and other factors (i.e. home life having a spill over effect on work) influence people's responses and performance at work. Work events trigger positive or negative emotional reactions and employees' personalities predispose them to respond with greater or lesser intensity to the event.

   d. **How often will the heat map be updated?**
   Depending on the current situation and how often the current status quo changes the frequency of updating the heat map should be adapted. During slower times with more stability once a month may suffice, while in the middle of the crisis where the reality changes almost daily a weekly update may be advisable

   e. **Who will the heat map be shared with, and who should have access to it?**
   Only people who require the information as part of their own role should have access; including those responsible for implementing and monitoring progress on the agreed support plans. The direct line manager, senior manager, and/or HR representative may need access, and depending on the maturity of the team and how comfortable they are sharing with each other those people on the heat map could have access.

4. **Implement the heat map in line with what was agreed in step 1 – 3**.

CONTACT   If you have any further questions, please do not hesitate to consult your regional Organisational Effectiveness Specialist

ADDENDUM A: EXAMPLE QUESTIONS

Used correctly the heat map facilitates conversation around the status of individuals against predetermined factors to identify areas where they are coping and areas where they may require support. The example questions below are designed to guide your conversation in measuring the status of the individual's psychological well-being, work outputs, and quality of leadership.

PSYCHOLOGICAL WELL-BEING (MANAGING SELF)

- ☐ How would you currently rate your own personal emotional and psychological well-being?
- ☐ What factors are currently helping or hindering your personal psychological well-being?
- ☐ What has your emotional response to the Covid-19 crisis looked like thus far and how has it changed over time?
- ☐ What challenges do you currently experience in terms of managing your emotional response?
- ☐ What support do you need to improve your personal psychological well-being?

WORK OUTPUTS (MANAGING WORK)

- ☐ How would you currently rate yourself in terms of being in control of your work demands?
- ☐ What is currently on your work to-do list and how are you progressing on these tasks / responsibilities?
- ☐ Which of the items on your current to-do list is currently on target (in terms of expected deadlines and standards) and which are not? What are the key reasons for this?
- ☐ What factors are currently hindering or helping you achieve your work outcomes?
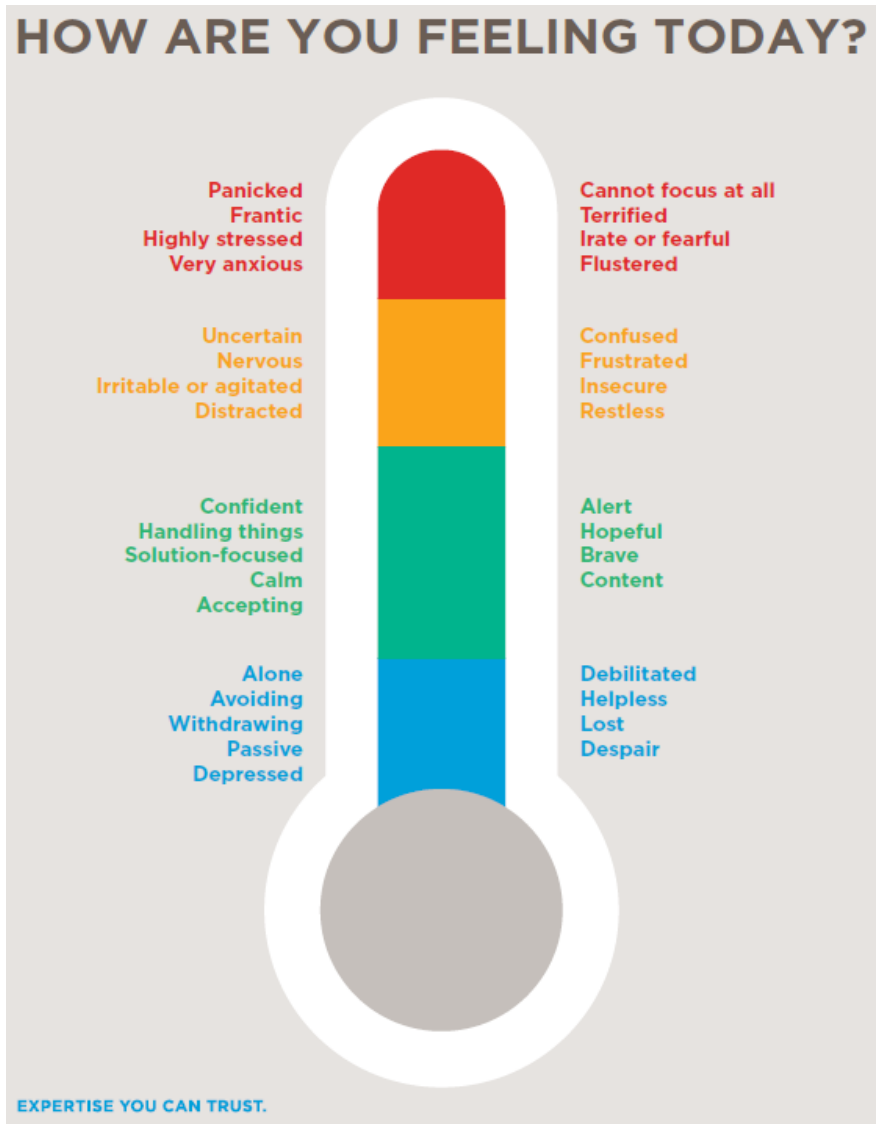- ☐ What support do you need right now to help you feel more in control of your work demands?

LEADERSHIP (LEADING OTHERS)

- ☐ How are your team currently doing in terms of work outputs, emotional well-being and teamwork?
- ☐ How often do you check in on the individuals on your team?
- ☐ What tools do you use to keep track of your team members during these difficult times?
- ☐ What actions/ initiatives have you implemented to support your direct reports?
- ☐ What challenges do you currently experiences in terms of leading your team?
- ☐ What support do you need right now in terms of leading your team?

ADDENDUM B: HEAT MAP EXAMPLE

Job Title	Name	Leading Others 21 May	Leading Others 28 May	Leading Others 4 June	Specific Needs / Requests	Other Notes / Comments	Proposed Actions
Hospital General Manager	John Doe	John is not checking in with individuals	John is still taking a back seat and letting the team manage the situation	John has started with one-on-one interactions		John may be afraid to check in with individuals because he is not sure that he will know how to deal with the responses	Strongly encourage the use and implementation of the heat map tool. List the resources available to him in dealing with staff challenges (Organisational Effectiveness Team, HR Operations team, etc.)
Hospital Clinical Manager	Sukie Mtwetwe	No urgent needs voiced	Sukie voiced that she is not sure that she is fully informed or where team members are at.	Sukie implemented the heat map tool and is checking in with staff but little action is coming from it.	Sukie has asked for some example actions to address specific challenges	Progress made in the right direction	Sukie can use the heat map to feel more in the loop and in control of where the Unit Managers are at. She will update the document with specific actions plans to address areas of concern
Nursing Services Manager	Saartjie Baardman	Saartjie is not considering her team at all; the Unit Managers are expected to manage on their own	Saartjie checks in with her team but does not feel sufficiently equipped to help them deal with their challenges	Saartjie comes across as flustered and out of control, her anxiety is preventing her from being there for the Unit Managers		Urgent intervention needed.	Arrange check-in session with trained specialist (Hospital Psychologist, Organisational Effectiveness Specialist, etc.)
Deputy Nursing Services Manager							
Deputy Nursing Services Manager (theatre)							
Night Duty Manager							
Pharmacy Manager							
Head of Emergency Centre							
Patient Admin Manager							
Financial Admin Manager							
Technical Manager							
Support Services Manager							
HR Business Partner							
Patient Experience Manager							
Doctor Relationships Manager							
Day Clinic Manager							
Unit Manager Theatre							
Unit Manager EC							

ADDENDUM C: THERMOMETER

HOW ARE YOU FEELING TODAY?

Panicked
Frantic
Highly stressed
Very anxious

Cannot focus at all
Terrified
Irate or fearful
Flustered

Uncertain
Nervous
Irritable or agitated
Distracted

Confused
Frustrated
Insecure
Restless

Confident
Handling things
Solution-focused
Calm
Accepting

Alert
Hopeful
Brave
Content

Alone
Avoiding
Withdrawing
Passive
Depressed

Debilitated
Helpless
Lost
Despair

EXPERTISE YOU CAN TRUST.

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TIP

Refer to the Heat Map Guideline in the Line Manager Toolkit for further information on this tool.