Management & Leadership Handbook
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Facilitated by
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Management is efficiency in climbing the ladder of success; leadership determines whether the ladder is leaning against the right wall."
— Stephen R. Covey

Differentiating between Management and Leadership

Leadership and management are two notions used to describe two related concepts. Managers do things right, leaders do the right thing. But this distinction is too facile and too simple. Leadership has two implied meanings. It can be defined in terms of position, as in being in a leadership position. A more fruitful way to think about leadership concerns the distinction between occupying a leadership position and being effective in that position. Leadership ought to be evaluated in terms of the performance of the group over time. It relates directly to the ability to build and maintain a group that performs well compared to its competition. In this section, these differences are discussed, explaining why both terms are thought to be similar.

Leadership is just one of the many assets a successful manager must possess. The principal aim of a manager is to maximize the output of the organisation through administrative implementation. To achieve this, managers must undertake the following functions:

- organisation
- planning
- staffing
- controlling
- directing

Leadership is an important component of the directing function. A manager must manage as well as lead. Managers need formal authority to be effective. This involvement cannot be delegated. Moreover, in many day-to-day circumstances, leadership is not required. For example, in answering routine emails and phone calls or in assigning daily work responsibilities, a leader is simply managing or transacting business.

Often with small groups, it is not the top manager who emerges as the actual leader. In many cases it is a subordinate member with specific talents who leads the group in a certain direction. Leaders must often let vision, strategies, goals, and values guide the group action and behaviour rather than attempting to control others. When a natural leader emerges in a group containing a manager, conflict may arise if they have different views. When a manager sees the group looking towards someone else for leadership he may feel his authority is being questioned.
Groups are often more loyal to a leader than a manager. This loyalty is created by the leader in areas such as:

- Taking the blame when things go wrong.
- Celebrating group achievements, even minor ones.
- Giving credit where it is due.

The leader should recognise the successes within a team. Leaders are observant and sensitive people. They know their team and develop mutual confidence within it.

Leading involves influencing others toward the attainment of organisational objectives. Effective leading requires the manager to motivate subordinates, communicate effectively, and effectively use power. If managers are effective leaders, their subordinates will be enthusiastic about exerting effort toward the attainment of organisational objectives. To become effective at leading, managers must first understand their subordinates' personalities, values, attitudes, and emotions. Therefore, the behavioural sciences have made many contributions to the understanding of this function of management. Personality research and studies of job attitudes provide important information as to how managers can most effectively lead subordinates.

Studies of motivation and motivation theory provide important information about the ways in which workers can be energized to put forth productive effort. Studies of communication provide direction as to how managers can effectively and persuasively communicate. Studies of leadership and leadership style provide information regarding questions such as, "What makes a manager a good leader?" and "In what situations are certain leadership styles most appropriate and effective?"

**Factors of Leadership:**

There are four major factors in leadership:

1. **Follower**
   Different people require different styles of leadership. For example, a new hire requires more supervision than an experienced employee. A person who lacks motivation requires a different approach than one with a high degree of motivation. You must know your people! The fundamental starting point is having a good understanding of human nature, such as needs, emotions, and motivation.

2. **Leader**
   You must have an honest understanding of who you are, what you know, and what you can do. Also, note that it is the followers, not the leader who determines if a leader is successful. If they do not trust or lack confidence in their leader, then they will be uninspired. To be successful you have to convince your followers, not yourself or your superiors, that you are worthy of being followed.
3. Communication
You lead through two-way communication. Much of it is nonverbal. For instance, when you "set the example," that communicates to your people that you would not ask them to perform anything that you would not be willing to do. What and how you communicate either builds or harms the relationship between you and your employees.

4. Situation
All are different. What you do in one situation will not always work in another. You must use your judgment to decide the best course of action and the leadership style needed for each situation. For example, you may need to confront an employee for inappropriate behaviour, but if the confrontation is too late or too early, too harsh or too weak, then the results may prove ineffective.

Various forces will affect these factors. Examples of forces are your relationship with your seniors, the skill of your people, the informal leaders within your organisation, and how your company is organized.

Managing and leading are related activities. All managers lead some of the time. Individuals at the top of organisations, normally considered “leaders,” have to manage on a daily basis. Top managers (e.g., CEOs or executive vice presidents) are generally viewed by subordinates and the public in a different way from line managers. This is primarily because of the level of responsibility: top managers like CEOs spend more of their time on strategy, wide-ranging communication across the organisation, and in “regal” functions. Line (or lower-level) managers typically are involved in more direct functional activities (marketing, production, finance, HR) and less concerned with the broader functions associated with “leaders.”

In the past, we have referred to management and managers quite separately from leadership and leaders. To manage was to plan, organise, direct, and control – “a way to reduce chaos in organisations and to make them run more effectively and efficiently”. To lead was to motivate, inspire, guide and coach - “a process whereby an individual influences a group of individuals to achieve a common goal”. It is only recently that we have begun to describe the two roles in conjunction with each other. Managerial leadership describes managers as leaders and leaders as managers, a combination that compliments and balances the needs of changing organisations, and a combination that suggests the need for combined models and multiple frameworks to strategically and tactically navigate the future before us. If management is a process of producing order and stability, and leadership is a process that produces change and movement, there does appear to be an overlap of both roles, whether at the manager level or CEO level. "When managers are involved in influencing a group to meet its goals, they are involved in leadership. When leaders are involved in planning, organising, staffing, and controlling, they are involved in management. Both processes involve influencing a group of individuals toward goal attainment."
The evolution of management and leadership models and frameworks are works in progress, and the process of both is becoming more complex, challenging the conventional thinking and wisdom of the past. We are in search of more integrated models to serve our thinking and actions in the future, and to meet the increasing needs and ensure the future success of our current and up-and-coming competent, ethical, leaders.
Table 1: The table below captures the main differences between Management and Leadership.

<table>
<thead>
<tr>
<th>Transational (Management related)</th>
<th>Transformational (Leadership related)</th>
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<tr>
<td><strong>Models</strong></td>
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<tr>
<td>- Rational, Internal Process,</td>
<td>- Human Relations, Open Systems,</td>
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<td>Structure, Power, Knowledge</td>
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<td><strong>Approaches and Theories</strong></td>
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<td>- Trait approach</td>
<td>- Transformational Leadership</td>
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<td>- Skills approach</td>
<td>- Team leadership</td>
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<td>- Style approach</td>
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<td>- Situational approach</td>
<td>- Psychodynamic approach</td>
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<td>- Contingency theory</td>
<td>- Ethical leadership</td>
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<td>- Path-goal theory</td>
<td>- Woman and leadership</td>
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<td>- Leader-Member exchange theory</td>
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<td>- Team leadership</td>
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<td>- Four drive theory</td>
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<td><strong>Role of Manager and Leader</strong></td>
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<td>- Planner</td>
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<td>- Controller</td>
<td>- Influencer</td>
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<td>- Mentor</td>
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<td>- Coordinator</td>
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<td>- Producer</td>
<td>- Coach and Guide</td>
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<td>- Director</td>
<td>- Moral, Ethical Leader</td>
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<td>- A process that reduces chaos</td>
<td>- A process that encourages chaos</td>
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<td>and produces order and stability</td>
<td>(challenges status quo) and</td>
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<tr>
<td>- Accomplishes mission</td>
<td>produces change and movement</td>
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<td>- Defines the organisation through</td>
<td>- Creates a vision</td>
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<td>organic structure with flexible</td>
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<td>defence-like strategy (pg. 233)</td>
<td>protector-like strategy (pg. 233)</td>
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<td>- Focused on sustainability</td>
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At certain times, organisations thrive and prosper under transactional leadership, and at other times they need transformational leadership, particularly in times of rapid change. Based on a more contingent view of leadership, “An ideal strategic leader would be able to identify – and exercise – the leadership behaviours appropriate for the circumstances”.

“There is evidence that leaders may possess both transactional and transformational behaviours. Recent research has suggested that transformational leadership builds on transactional leadership and, in particular, on contingent reward behaviours. By consistently honouring transactional agreements, CEOs build trust, dependability, and an image of consistency among organisational members. These can contribute to the high levels of trust and respect associated with transformational leaders. In addition, a leader may excel at transformational behaviours but may choose transactional behaviours when needed”

A contingency theory needs to be taken in light of the variation of a manager’s work, including the size of the organisation, technology in use, external environmental factors, and individual needs. Although somewhat conceptual in nature, the adaptive nature of this kind of leadership approach lends itself to differing conditions and constant changes present in organisations today. Young organisations respond favourably to transformational leadership, mature organisations to transactional leadership, and those in a decline or renewal stage need a transformational leader. It also recognizes the importance of the psychodynamic approach to leadership – the importance of being more self-aware and more insightful about oneself and ones capabilities – articulated as a facet of ‘emotional intelligence’ by Daniel Goleman. It is also possible that as one gains a greater recognition and acceptance of one’s strengths and weaknesses, there is greater appeal to the concept of shared leadership within both leadership teams, and the organisation.

Can this approach be practiced? As an example, a hospital leader and leadership team in the midst of enormous change and facing increasingly demanding economic conditions. The board hired a transformational leader with a strong transactional style. His first two years were spent building a high level of trust by using his transactional skills and style. His first challenge was squelching the entry of a nurses union to the hospital. In the third year he became a learner, pushing the accepted boundaries of a stable, yet stagnant, culture, and influencing the organisation and its members for the need for change – now. The culture is changing. New hires fit the mould of transformational leadership primarily, with the fall back of transactional leadership. Those who could not move from transactional to transformation have “deselected” – they have been forced out or have resigned of their own accord. Performance goals are articulated and followed as bonus plan has been implemented - a more contingent reward system to encourage new behaviours and performance. Learning is emerging as a renewed core value, to support continued learning and new ways of thinking about problems. The CEO is becoming a learning leader, and a trusted, well-respected one at that, both inside the organisation, and outside in the community. This is a real example of a
leadership approach that blends transactional and transformational leadership in practice, and it is working.

More good news is that, “transactional and transformational leadership behaviours can be learned through training programs”, which may make it additionally appealing to practitioners. Individuals can develop both leadership behaviours and can have a positive impact on both organisational learning and therefore, organisational performance. A blending of the two approaches is further supported by “Level 5 Leadership” – a blending of genius and personal humility and professional will. Level 5 leaders recognize the need for inspirational motivation, personal attention to followers, innovation and the freedom to be innovative – a culture of discipline that encourages genius, supports freedom and expects responsibility. Level 5 leaders also recognize the need to “confront the brutal facts” and focus on performance, and the importance of producing results. These factors directly reflect the effectiveness and success of a leader.

Are transactional and transformational skills and abilities necessary for all levels of leadership? Given the nature of their role, frontline supervisors and lower level managers should be focused on developing the competencies required for both their current role and their future role as leaders in the organisation. Mid-level managers, however, are currently being asked to both manage and lead. In future, they will be asked to fill the shoes of senior leadership and should therefore be open to the notion of transformational leadership styles, including the importance of ethical influence in an environment where old problems must be thought of in a new way.

Victor Frankel (1959) states, “In the final analysis it becomes clear that the sort of person the prisoner became was the result of an inner decision and not the result of camp influences alone. Fundamentally, therefore, any man can, even under such circumstances, decide what shall become of him – mentally and spiritually”. This thought also applies philosophically to leadership. To become a leader is an inner decision, a choosing of an attitude or stance that models ones beliefs and values in an active way, through our deeds and conduct, in the interest of making things better and serving life rather than life serving us. People often refer to leadership as “a calling” – perhaps a higher calling. It’s intelligence, it’s hard work, and it’s a keen understanding and appreciation of human nature and human beings – a set of technical competencies and a set of emotional competencies, diverse enough and flexible enough to move with the changing tide and control our own destinies.
Leadership challenges at work

There are five challenges most leaders will face during their tenure as leaders, whether working for a corporation or for themselves.

**Challenge 1 – Creating and Maintaining a Diversified Team**

All leaders work with teams. These teams include diverse individuals with different backgrounds, experiences and even ethnicity's. One of the greatest challenges of leadership in modern society is finding ways to create a unified front among team members. This is often difficult when members of a team may remain at remote areas. Thanks to modern technology, not all members of a team will necessarily work in the same facility. A leader can overcome the challenges associated with creating and preserving a diversified team by encouraging horizontal communication and knowledge sharing. What this means is information does not come from the top-down alone, but instead from person to person. The best way to create and uphold a diversified yet efficient team is to make sure each member of the team receives routine communications.

**Challenge 2 – Inspiring Others to Share The Leader’s/Organisational Vision**

A mission and vision are essential to any successful business. It is not enough however, for a leader to promote a vision or mission. Rather, it is the role of a leader to ensure that every member of their team and the organisation share a common mission and vision. A leader can take on the challenge of inspiring others by clearly communicating how a company’s mission and vision will benefit not just the organisation, but also the people working for it. By explaining how each incumbent will benefit from the mission, a leader will inspire others to share the same corporate vision.

**Challenge 3 – Facilitating Open and Clear Communication among Coworkers:**

Clear and concise communication is essential for success. A leader has a duty to communicate well with others, but also teach others how to communicate clearly.

**Challenge 4 – Empowering Incumbents to Take Action:**

The days of micromanagement are over. Nowadays, employees want to feel inspired. The best way to inspire employees is by empowering them to excel and achieve. A leader’s role includes providing employees the ability to make proactive choices. That means including employees in the decision making process so they become part of the organisational team. A leader can also empower employees by encouraging them to write down an action plan for each problem that needs solving in the organisation. This process should include setting up goals and the exact steps necessary to take action to resolve problems.

**Challenge 5 – Providing Inspiration To Others**

Last, but certainly not least, a leader must provide inspiration to others. Some of the world’s best leaders are defined by their “charisma” or ability to inspire and motivate others. A leader must remain committed to the cause, but also recognize the potential in employees to achieve great things.
What are the challenges that you face in your work environment in your role as a leader?

 Management challenges at work

The seven biggest challenges faced by a manager.

Challenge 1: Achieving a Stretch Goal:
The organisation you’re managing is responsible for something — whether it’s performing a business process, supporting some other organisation, developing a new product, or getting new customers. There are goals associated with your objectives, and if your organisation is aggressive then those goals require more than the typical amount of effort. It’s going to take some careful planning for you to figure out how to apply your organisation’s people and resources to achieve an aggressive goal. You’re going to have to motivate people, remove roadblocks from their path, and focus them on the things that are most important. It’s a stretch goal, but you can achieve it — maybe even surpass it.

Challenge 2: Bringing Out the Best in Your Employees:
All employees have good days and bad days. Some of the causes are out of your control. But it’s important that you take steps to make as many days as possible “good days.”

Here are some of the things that you can do:

- Treat every employee with respect. If you have praise for the employee, give the praise in front of co-workers. If you have criticism for the employee, give it in private. For all but the worst underperforming employees, make sure that the praise happens much more often than the criticism.
- Help employees align their personal goals with their work goals. Talk with each employee about his or her personal goals: what they want to get out of life, where they want their career to go. To the extent possible, use this information to help you allocate work assignments.
- Provide a work environment that is appropriate for the work and conducive to employee well-being. A comfortable work environment makes your employees more productive.
- Encourage employee communication and cooperation. For example, in one of my management jobs, I held a monthly lunch for my employees. During the lunch I updated them
on any company news I’d heard, and I had some of the employees describe their recent work and some of their challenges. We also had a series of awards. But these were not your typical awards. Each award was given by the previous award recipient to someone who exemplified the spirit of the particular award. There was a “Gumby” award (a Gumby character) given to the most flexible employee, and other awards for things like putting the team ahead of yourself, most creative outside-the-box idea, and unluckiest employee. Employees sometimes even created their own one-time awards when something special or unusual happened. Over time the number of awards grew, and the interchange of enthusiasm and ideas made the organisation a happy and fun place to work.

**Challenge 3: Dealing with Underperforming Employees:**
Not all of your employees will do their best. Some will have personal issues that interfere with their work. Technically it’s not your problem, but in reality any issue that contributes to an underperforming employee is your problem. You’ll help employees cope with personal issues, you’ll provide motivation and counsel, maybe steer them to appropriate resources inside or outside your company. You’ll “carry” your underperforming employees to a point, and then beyond that point you’ll have to ease them out of your organisation. You’ll be humane, but you have to balance the needs of the organisation with the needs of the employees.

**Challenge 4: Dealing with Outstanding Employees:**
Some of your employees obviously outperform the others. That’s good news for your organisation, but it presents its own set of challenges. Outstanding employees need special treatment. You want them to keep doing an exceptional job but that usually means that you’ll have to pay them special attention. They need recognition for their talents and efforts. They need encouragement, training and guidance. And above all they need to know that they have a career path in your company, even if that career path takes them out of your organisation. You’ll be tempted to hold on to your outstanding employees and keep them from being promoted out of your organisation. You shouldn’t do that. When an employee star outgrows your organisation, the best thing for your company is to make sure that the employee finds a home in another part of your company where he or she can continue to contribute. And ultimately, you’ll be rewarded for your good deed of helping the employee achieve his or her potential. Your reputation as a “team player” and good manager will grow, and your own career will be enhanced.

**Challenge 5: Hiring the Right People:**
No matter how happy your employees are, you’ll get occasional turnover. And if your organisation is successful then you’ll often find that your budget and headcount will grow as you are assigned more and more responsibility. Either way, you’ll need to hire. Hiring is easy, but hiring the right person is extremely difficult. The trick in hiring is to get an understanding of how an employee will actually perform the work — not just how the employee does in interviews. Interviews are seldom a good
predictor of work and work habits, so going beyond the interview is crucial. I've sometimes used unconventional interviewing techniques. I've done the traditional interview, but then I've tried some things that gave me a better feel for how the interviewee will perform in an actual work situation. For example, for some programmer positions, I had the prospective employee spend some time with his/her future co-workers, going through a task that the current employee was doing. Getting feedback from the current employee (who had a vested interest in finding someone who would carry a part of the workload) made a big difference in our choice for some potential new hires. And the process also increased our acceptance rate for job offers, since the job applicants had a better feel for the environment into which they were being hired.

**Challenge 6: Responding to a Crisis:**
No matter how much planning you do, things will go wrong. An employee will get sick at a critical time. A weather disaster will hit your facility and disrupt your plans. A crime will be committed — maybe a theft or even something that harms an employee. Planning is a part of managing, but perhaps more important is a manager’s ability to change plans on the fly in response to changing conditions. When a crisis hits, you have to be able to deal with it — calmly, quietly and without being overwhelmed by stress.

**Challenge 7: Continuous Improvement:**
No matter how good your organisation gets, it can do better. There’s always some type of improvement that can be made: a change in a process, a better working environment, better employee motivation, more focus on the essentials. If you ever get to the point where you honestly have no idea how to improve things further, then you should either (a) seek outside advice, or (b) look for another job. There’s always a better way, and you have to keep looking for it.

What are the challenges that you face in your work environment in your role as a manager?

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SECTION 2: PRACTISING EFFECTIVE LEADERSHIP

Recognising Leadership Styles:

Leadership is influencing people -- by providing purpose, direction, and motivation -- while operating to accomplish the mission and improving the organisation. "Leadership style is the manner and approach of providing direction, implementing plans, and motivating people. There are normally three styles of leadership

- Authoritarian or autocratic
- Participative or democratic or consultative
- Delegative or free reign or laissez faire

Although good leaders use all three styles, with one of them normally dominating, bad leaders tend to stick with one style.

Below is a description of the most well-known and identifiable leadership styles:

**Authoritarian (autocratic)**

This style is used when the leader tells her employees what she wants done and how she wants it done, without getting the advice of her followers. Some of the appropriate conditions to use it are when you have all the information to solve the problem, you are short on time, and your employees are well motivated. Some people tend to think of this style as:

- a vehicle for yelling,
- using demeaning language, and
- leading by threats and
- abusing their power.

This is not the authoritarian style, rather it is an abusive, unprofessional style called bossing people around. It has no place in a leader’s repertoire. The authoritarian style should normally only be used on rare occasions. If you have the time and want to gain more commitment and motivation from your employees, then you should use the participative style.

**Participative, consultative democratic**

This type of style involves the leader including one or more employees in on the decision making process (determining what to do and how to do it). However, the leader maintains the final decision making authority. Using this style is not a sign of weakness; rather it is a sign of strength that your employees will respect. This is normally used when you have part of the information, and your
employees have other parts. Note that a leader is not expected to know everything -- this is why you employ knowledgeable and skillful employees. Using this style is of mutual benefit -- it allows them to become part of the team and allows you to make better decisions.

**Delegative (free reign)**

In this style, the leader allows the employees to make the decision. However, the leader is still responsible for the decisions that are made. This is used when employees are able to analyse the situation and determine what needs to be done and how to do it. You cannot do everything! You must set priorities and delegate certain tasks. This is not a style to use so that you can blame others when things go wrong, rather this is a style to be used when you have the full trust and confidence in the people below you. Do not be afraid to use it, however, use it wisely!

**Table 2: A useful summary of the main points from each leadership style:**

<table>
<thead>
<tr>
<th>Leadership Approach</th>
<th>Description</th>
<th>Key Theorists</th>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trait Approach</td>
<td>Identifies leadership traits or characteristics essential to effective leadership; focuses on leader not followers</td>
<td>Stogdill, Mann, Lord, Kirkpatrick and Locke</td>
<td>Is intuitively appealing, well researched, focuses on role of leader, provides us with assessment material</td>
<td>List of traits is endless, does not consider situation, highly subjective determination of what is “most important”, not useful for training up and coming leaders</td>
</tr>
<tr>
<td>Skills Approach</td>
<td>Focuses on skills and abilities rather than personality characteristics -- technical, human, and conceptual competencies</td>
<td>Katz, Mumford, Zaccaro, Harding, Jacobs, Fleishman, Yammarino</td>
<td>Suggests that many individuals have the potential for leadership, stresses importance of developing specific leadership skills, presents multi-faceted picture of leadership, and useful in leadership education</td>
<td>Too broad in scope as it addresses more than just leadership, does not explain how variations in a particular skill affects performance, claims not to be a trait model but includes individual attributes which are trait-like, and skills approach was developed using a large sample of military personnel</td>
</tr>
<tr>
<td>Style Approach</td>
<td>Focuses on what leaders do and how they behave -- actions of leaders toward subordinates in various situations; two styles or behaviours are task behaviours and relationship behaviours; Leadership Behaviour</td>
<td>Stogdill, Blake and Mouton, Ohio and Michigan studies</td>
<td>Expanded our understanding of leadership by researching what leaders do in various situations, substantiated by a multitude of studies offering a viable style with performance outcome, failed to identify a universal style that could be effective in every situation, and implies most effective style as high task, high relationship</td>
<td>Research does not link style with performance outcome, failed to identify a universal style that could be effective in every situation, and implies most effective style as high task, high relationship</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td><strong>Description Questionnaire and Management Grid</strong></td>
<td><strong>Approach to the leadership process, key to being an effective leader is balancing task and relationship, and prescriptive</strong></td>
<td><strong>relationship – this remains questionable and unclear</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Developed to describe how leaders reach their purposes – concern for production and concern for people – prescriptive rather than descriptive</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Situational Approach</strong></td>
<td><strong>Based on different situations requiring different kinds of leadership; leader must adapt style to the demands and different situations; effective leaders recognize the need to change the degree to which they are directive (task) or supportive (relationship) to meet changing needs of subordinates</strong></td>
<td><strong>Hersey and Blanchard</strong></td>
<td><strong>Accepted and used by practitioners as a credible model for training up and coming leaders, practical and easy to use and understand, prescriptive value, and emphasizes the concept of leader flexibility</strong></td>
<td><strong>Lack of strong body of research, four levels of subordinate development ambiguous and without theoretical basis, concern with how subordinate commitment is composed – not clear how confidence and motivation combine to define commitment, studies fail to support the prescriptions suggested in the model, did not correlate education, experience, age, etc. with how they influence leader-subordinate prescriptions of the model, more research needed to explain how leaders can adapt their styles simultaneously to the development levels of individual group member and the whole group, and questionnaire appears biased in forced response to questions in favour of model</strong></td>
</tr>
<tr>
<td><strong>Contingency Theory</strong></td>
<td><strong>Concerned with both styles and situations and referred to as leader-match theory; leaders effectiveness depends on how well the leader’s style fits the context; leadership styles are described as task motivated or relationship</strong></td>
<td><strong>Fiedler</strong></td>
<td><strong>Supported by much empirical research, shifts emphasis from leader to leadership context and the link between the two, predictive and useful in predicting type of leadership that will be most effective in certain</strong></td>
<td><strong>Unclear as to why certain leadership styles are more effective in some situations than other, some question of validity of LPC scale, instructions on the LPC scale are not clear, cumbersome and to</strong></td>
</tr>
<tr>
<td>Theory</td>
<td>Description</td>
<td>Authors</td>
<td>Notes</td>
<td></td>
</tr>
<tr>
<td>-------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
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<td></td>
</tr>
<tr>
<td>Path-Goal Theory</td>
<td>How leaders motivate subordinates to accomplish goals; the link between the leader’s style and the motivational needs of the subordinate within the work setting; leader can choose from directive, supportive, participative, and achievement-oriented behaviours to impact subordinates motivation</td>
<td>Evans, House, Dessler, Mitchell</td>
<td>First situational-contingency theory of leadership to explain how task and subordinate characteristics affect the impact of leadership on subordinate performance, uniquely designed to keep us asking, “How can I motivate subordinates to feel that they have the ability to do the work?”, and practical in that it reminds leaders to guide and coach subordinates along a path to achieve a goal. Difficult to use and complex, claims of theory are tentative because of partial support for empirical research studies, fails to describe how a leader can employ various styles directly to help subordinates feel competent and trusted, and path-goal theory could create a dependent relation between leader and subordinate failing to recognize the full abilities of the subordinate.</td>
<td></td>
</tr>
<tr>
<td>Leader-Member Exchange Theory (LMX)</td>
<td>Focuses on the quality of exchanges between leaders and members; high-quality exchanges produce less turnover, more positive performance, greater organisational commitment, better attitudes, greater participation, and can be used for “leadership making”; three phases of exchange are stranger phase, acquaintance phase and partner phase; both describes and prescribes leadership</td>
<td>Dansereau, Graen, Haga, Cashman, Uhl-Bien</td>
<td>Strong descriptive in that it describes work units in terms of those who contribute more and those who contribute less, only theory that makes the concept of the dyadic relationship the core of the leadership process, directs our attention to the importance of effective communication, and well-researched to support how LMX is related to positive organisational outcomes. Conflict with value of fairness by dividing the work unit into two groups: in-group and out-group – gives the appearance of discrimination, support the development of privileged groups in the workplace although LMX suggests that members of the out-group are free to become members of the in-group – question is how one gains access; needs further development, and few empirical studies regarding the measurement of leader-member.</td>
<td></td>
</tr>
<tr>
<td>Type of Leadership</td>
<td>Description</td>
<td>References</td>
<td>Discussion</td>
<td></td>
</tr>
<tr>
<td>--------------------</td>
<td>-------------</td>
<td>------------</td>
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<td></td>
</tr>
<tr>
<td><strong>Transformational Leadership</strong></td>
<td>Distinguishes between two types of leadership: transactional and transformational; transactional is the bulk of the models whereas transformational refers to the process that raises the level of motivation and ethics in both the leader and the follower; tries to help follower reach their fullest potential, raises their hopes and in the process changes himself/herself</td>
<td>Burns, Downton, Bryman, Lowe and Gardner, Bass, House, Bennis and Nanus, Tichy and DeVanna</td>
<td>Widely researched from many different perspectives, intuitively appealing in that leader provides vision, treats leadership as a process between leaders and followers, expands picture of leadership by moving beyond transactional elements, strong emphasis on needs and values of followers, and strong evidence that is an effective form of leadership.</td>
<td>Too broad, lacks conceptual clarity, questions around how transformational leadership is measured, some claim this model treats leadership as a personality trait or someone with special qualities which makes it difficult to teach, can be perceived as elitist and anti-democratic as leader acts independently as heroes, based largely on qualitative data collected from leaders at the top of organisations questioning its use with lower-level leaders, and it may have a tendency to be abused if the leadership is not challenged on values and vision.</td>
</tr>
<tr>
<td><strong>Team Leadership</strong></td>
<td>Two functions of leadership: task behaviours and maintenance behaviours, i.e. team performance and team development, with both an internal and external focus; most current research discusses teams with single-leadership vs. and shared leadership</td>
<td>Porter and Beyerlein, Ilgen et al, Zaccaro, Larson and LaFasto, Hackman,</td>
<td>Focuses on real-life organisational work in helping them stay competitive and effective, guide to help leaders design and maintain effective teams, recognizes changing roles of leaders and followers, and helps in selecting team leaders who are up to the task.</td>
<td>Not completely tested or supported, complex model in nature that does not provide practical approach or address issues of shared leadership or usual situations, and difficult to teach and develop skills.</td>
</tr>
<tr>
<td><strong>Psychodynamic Approach</strong></td>
<td>Leaders are more effective when they have insight into their own makeup and can gain a better understanding of their needs, predispositions, and</td>
<td>Freud, Jung, Zaleznik</td>
<td>Results in a better understanding of the relationship between leader and follower, applicable cross-culturally and exhibits a universality,</td>
<td>Bias is toward abnormal or dysfunctional being, highly subjective, research is clinical in nature and often culturally biased by</td>
</tr>
</tbody>
</table>
Effective delegation and situational leadership

In simple terms, a situational leader is one who can adopt different leadership styles depending on the situation. Most of us do this anyway in our dealings with other people: we try not to get angry with a nervous colleague on their first day; we chase up tasks with some people more than others because we know they'll forget otherwise. A good leader uses all three styles, depending on what forces are involved between the followers, the leader, and the situation. Some examples include:

- Using an authoritarian style on a new employee who is just learning the job. The leader is competent and a good coach. The employee is motivated to learn a new skill. The situation is a new environment for the employee.
- Using a participative style with a team of workers who know their job. The leader knows the problem, but does not have all the information. The employees know their jobs and want to become part of the team.
- Using a delegative style with a worker who knows more about the job than you. You cannot do everything! The employee needs to take ownership of her job. Also, the situation might call for you to be at other places, doing other things.
- Using all three: Telling your employees that a procedure is not working correctly and a new one must be established (authoritarian). Asking for their ideas and input on creating a new procedure (participative). Delegating tasks in order to implement the new procedure (delegative).

Forces that influence the style to be used included:

- How much time is available?
- Are relationships based on respect and trust or on disrespect?
- Who has the information - you, your employees, or both?
- How well your employees are trained and how well you know the task.
- Internal conflicts.
- Stress levels.

emotions; they are also more effective when they have insight into the same elements of their subordinates; focuses more on learned and deep-seated emotional responses that one may not be aware of – and not able to change, the key being acceptance of these quirks and the quirks of others
emphasizes the need for insight into self and encourages the pursuit of personal growth and development, and ultimately results in the leader becoming a teacher and counsellor as well as carrying out traditional leadership role
psychologists, lacking inclusion of diverse cultures and populations, does not take into account organisational factors, and is not adaptive to training in the classroom

| Emotions; they are also more effective when they have insight into the same elements of their subordinates; focuses more on learned and deep-seated emotional responses that one may not be aware of – and not able to change, the key being acceptance of these quirks and the quirks of others | Emphasizes the need for insight into self and encourages the pursuit of personal growth and development, and ultimately results in the leader becoming a teacher and counsellor as well as carrying out traditional leadership role | Psychologists, lacking inclusion of diverse cultures and populations, does not take into account organisational factors, and is not adaptive to training in the classroom |
- Type of task. Is it structured, unstructured, complicated, or simple?
- Laws or established procedures such as OHSA or training plans.

Factors that affect situational decisions include motivation and capability of followers. This, in turn, is affected by factors within the particular situation. The relationship between followers and the leader may be another factor that affects leader behaviour as much as it does follower behaviour. The leaders' perception of the follower and the situation will affect what they do rather than the truth of the situation. The leader's perception of themselves and other factors such as stress and mood will also modify the leaders' behaviour.

Other authors seek to combine other approaches and identify six variables:
- *Subordinate effort*: the motivation and actual effort expended.
- *Subordinate ability and role clarity*: followers knowing what to do and how to do it.
- *Organisation of the work*: the structure of the work and utilization of resources.
- *Cooperation and cohesiveness*: of the group in working together.
- *Resources and support*: the availability of tools, materials, people, etc.
- *External coordination*: the need to collaborate with other groups.

Leaders here work on such factors as external relationships, acquisition of resources, managing demands on the group and managing the structures and culture of the group.

There are various models for leadership out there; for the sake of this training we will use the Situational Leadership model.

**Figure 1: Situational Leadership model**

![Leadership Styles Diagram](image-url)
However, when paternalistic or autocratic styles are relied upon too much and the employees are ready and/or willing to react to a more consultative type of leadership style, then it normally becomes quite damaging to the performance of the organisation.

**The Managerial Grid: Blake and Mouton**

Working in this field in the 1960's Robert Blake and Jane Mouton developed the 'managerial grid' which could be used to identify a manager's existing style and provide a 'path' to the ideal management or leadership style.

During the course of their studies they identified 2 extremes:

- **Consideration (employee orientation)** - Leaders are concerned about the human needs of their employees. They build teamwork, help employees with their problems, and provide psychological support. (Concern for people)
- **Structure (task orientation)** - Leaders believe that they get results by consistently keeping people busy and urging them to produce (Concern for production)

Those very high in concern for production but very low in concern for people, were designated 'task manager' and usually adopted an authoritarian style. Those very high in concern for people but very low in concern for production were designated 'country club' and adopted a laissez-style.

Also notice that consideration and structure are independent of each other, thus they should not be viewed on opposite ends of a continuum. For example, a leader who becomes more considerate does not necessarily mean that he has become less structured. Keeping the above in mind, it seems that some picture paternalistic behaviour as almost a barbaric way of getting things accomplished. Yet, leadership is all about getting things done for the organisation. And in some situations, a paternalistic style of decision-making might be required; indeed, in some cultures and individuals, it may also be expected by not only those in charge, but also the followers. Leadership in this model could be viewed on a continuum. This allows a wide range of individual behaviours to be dealt with, ranging from beginners to peak performers. In addition, it accounts for the fact that not everyone is the same.

There are two basic behaviours that a leader or manager can use to influence another person. These two behaviours can be described as directive or supportive. Ken Blanchard created a model within which he describes what he calls: directive and supportive behaviour.
So how do we decide which leadership style or behaviour is the right one for a particular situation? Blanchard and Hersey argue that the right leadership style will depend very much on the person being led - the follower. They also extended their model to include the Development Level of the follower. This model argues that the developmental levels of a leader's subordinates play the greatest role in determining which leadership styles or behaviours are most appropriate for a particular situation. According to this conceptualization, we have learnt that leader behaviours fall along two continua, directive behaviour, and (supportive behaviour.) Blanchard and Hersey said that the leader's style should be driven by the Competence and Commitment of the follower, and came up with four levels:

### Four development levels of followers

The Blanchard Leadership Model takes a situational perspective of leadership. Development Levels are also situational. You might be generally skilled, confident and motivated in your job, but would still drop into Level D1 when faced, say, with a task requiring skills you don't possess.

For example, lots of managers are D4 when dealing with the day-to-day running of their department, but move to D1 or D2 when dealing with a sensitive employee issue.

---

**Figure 2: Directive and supportive behaviours**

<table>
<thead>
<tr>
<th>PARTICIPATIVE</th>
<th>AUTHORITARIAN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supporting 3</td>
<td>Coaching 2</td>
</tr>
<tr>
<td>Delegating 4</td>
<td>Telling 1</td>
</tr>
<tr>
<td>DYNAMIC</td>
<td>CONSULTING</td>
</tr>
</tbody>
</table>

---

**Figure 3: Development Levels:**

<table>
<thead>
<tr>
<th>Level</th>
<th>Competence</th>
<th>Commitment</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>D4</td>
<td>High</td>
<td>High</td>
<td>Experienced at the job, and comfortable with their own ability to do it well. May even be more skilled than the leader.</td>
</tr>
<tr>
<td>D3</td>
<td>High</td>
<td>Variable</td>
<td>Experienced and capable, but may lack the confidence to go it alone, or the motivation to do it well / quickly</td>
</tr>
<tr>
<td>D2</td>
<td>Some</td>
<td>Low</td>
<td>May have some relevant skills, but won't be able to do the job without help. The task or the situation may be new to them.</td>
</tr>
<tr>
<td>D1</td>
<td>Low</td>
<td>Low</td>
<td>Generally lacking the specific skills required for the job in hand, and lacks any confidence and / or motivation to tackle it.</td>
</tr>
</tbody>
</table>
Blanchard and Hersey said that the Leadership Style (S1 - S4) of the leader must correspond to the Development level (D1 - D4) of the follower - and it's the leader who adapts. The Blanchard model combines the behaviour grid (similar to the Blake- Mouton Managerial Grid) with the Developmental Levels of subordinates to arrive at some conclusions about appropriate leadership styles. In other words, the Developmental Level of the Subordinates determines which of the four leadership styles (S1, S2, S3, or S4) is correct for a particular situation.

**The four situational leadership styles**

Blanchard and Hersey defined leadership style or behaviour in terms of the amount of direction and support that the leader gives to his or her followers.

Blanchard differentiates between four different leadership styles namely:

- **Directing**: Leaders define the roles and tasks of the 'follower', and supervise them closely. Decisions are made by the leader and announced, so communication is largely one-way.

- **Coaching**: Leaders still define roles and tasks, but seeks ideas and suggestions from the follower. Decisions remain the leader's prerogative, but communication is much more two-way.

- **Supporting**: Leaders pass day-to-day decisions, such as task allocation and processes, to the follower. The leader facilitates and takes part in decisions, but control is with the follower.

- **Delegating**: Leaders are still involved in decisions and problem-solving, but control is with the follower. The follower decides when and how the leader will be involved.

Blanchard and Hersey say that effective leaders choose a particular leadership style or behaviour depending on the situation. They argue that Blanchard the Leadership Style (S1 - S4) of the leader must correspond to the Development level (D1 - D4) of the follower - and it's the leader who adapts. The Blanchard model combines the behaviour grid (similar to the Blake- Mouton Managerial Grid) with the Developmental Levels of subordinates to arrive at some conclusions about appropriate leadership styles. In other words, the Developmental Level of the Subordinates determines which of the four leadership styles (S1, S2, S3, or S4) is correct for a particular situation. This grid demonstrates the process.
Adapting your leadership style

Leaders should adapt their style to follower development style (or ‘maturity’); based on how ready and willing the follower is to perform required tasks (that is, their competence and motivation).

There are four leadership styles (S1 to S4) that match the development levels (D1 to D4) of the followers. The four styles suggest that leaders should put greater or less focus on the task in question and/or the relationship between the leader and the follower, depending on the development level of the follower.

**Style 1: Telling / Directing**

<table>
<thead>
<tr>
<th>Follower: D1</th>
<th>Low competence and high commitment / Unable and willing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leader</td>
<td>High task focus, low relationship focus</td>
</tr>
</tbody>
</table>

When the follower cannot do the job but is willing to try, then the leader takes a highly directive role, telling them what to do but without a great deal of concern for the relationship. The leader may also provide a working structure, both for the job and in terms of how the person is controlled. If the leader focused more on the relationship, the follower may become confused about what must be done and what is optional. The leader thus maintains a clear ‘do this’ position to ensure all required actions are clear.

**Style 2: Selling/Coaching**

<table>
<thead>
<tr>
<th>Follower: D2</th>
<th>Some competence and low commitment / Unable and unwilling</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leader</td>
<td>High task focus, high relationship focus</td>
</tr>
</tbody>
</table>

When the follower can do the job, at least to some extent, but is not motivated to do it then the leader must turn attention to the human aspects. The leader first finds out why the person is not motivated and if there are any limitations in ability. These two factors may be linked, for example where a person...
believes they are less capable than they should be may be in some form of denial or other coping. They follower may also lack self-confidence as a result. The leader thus spends time listening and advising and, where appropriate, helping the follower to gain necessary skills through coaching methods.

**Style 3: Participating/Supporting:**

<table>
<thead>
<tr>
<th>Follower: D3</th>
<th>High competence and variable commitment/ Able and unwilling</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leader</td>
<td>Low task focus, high relationship focus</td>
</tr>
</tbody>
</table>

When the follower can do the job, but is refusing to do it or otherwise showing insufficient commitment, the leader need not worry about showing them what to do, and instead is concerned with finding out why the person is refusing and thence persuading them to cooperate. There is less excuse here for followers to be reticent about their ability, and the key is very much around motivation. If the causes are found then they can be addressed by the leader. The leader thus spends time listening, praising and otherwise making the follower feel good when they show the necessary commitment.

**Style 4: Delegating**

<table>
<thead>
<tr>
<th>Follower: D4</th>
<th>High competence and high commitment / Able and willing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leader</td>
<td>Low task focus, low relationship focus</td>
</tr>
</tbody>
</table>

When the follower can do the job and is motivated to do it, then the leader can basically leave them to it, trusting them to get on with the job. Followers at this level have less need for support or frequent praise, although as with anyone, occasional recognition is always welcome.

**Influencing and motivating your team**

One function that a leader of a team must perform is holding the team together. A leader is responsible for:

- ensuring project goals are met
- ensuring a full team effort
- keeping the team happy

The key to holding the team together is motivation. To motivate is to: "cause (person) to act in a particular way; stimulate interest of (person in activity)." In simple terms, motivation can be considered as the amount of effort an individual is willing to put into their work. Therefore, it is important to ensure that any team is highly motivated towards their work. A lack of motivation in any member of a team can have a negative effect, reducing the group's effectiveness and possibly leading to the demotivation of others. Given the fact that different people are motivated in different ways, the problem
facing someone in the role of leader is to create an environment in which each individual fulfils their potential. It is important to highlight the major influences in the motivation of people. According to the influential motivator-hygiene theory, motivation occurs when people have job satisfaction. Job satisfaction can be improved by increasing opportunities for:

- Achievement
- Recognition
- Responsibility
- Career advancement

While not increasing job satisfaction, improvements in the following areas can lessen job dissatisfaction:

- Supervision
- Salary
- Working conditions

The following steps can be taken to help achieve and maintain group motivation:

- Provide opportunities for group members to become acquainted.
- Indicate the importance/value of the group.
- Make people feel they are important.
- Clarify goals.
- Identify progress
- Acknowledge achievements

The Art of Persuasion and Negotiation

PERSUADING involves being able to convince others to take appropriate action. NEGOTIATING involves being able to discuss and reach a mutually satisfactory agreement. INFLUENCING encompasses both of these.
Persuading:
One scenario where persuading skills can be important is the job interview, but the following tips are valuable in many other settings:

- Focus on the needs of the other party.
- Take time to listen to them carefully and find out about their interests and expectations. This shows that you are really interested in them and they are then more likely to trust and respect you. It will also make it easier for you to outline the benefits of your proposal in terms they understand.

- Argue your case with logic. Do careful research on your ideas and those of your competitors (if there are any) and make sure that any claims you make can be verified.
- The more hesitant language you use such as "isn't it", "you know", "um mm" and "I mean" the less people are likely to believe your argument.
- Use positive rather than negative language: instead of saying "You're wrong about this", say "That's true, however ...", "That's an excellent idea, but if we look more deeply ....." or "I agree with what you say but have you considered ....... ".
- Subtly compliment the other party. For example: "I see that you've done some really excellent research into this". Even though they may realise this is being done, evidence shows that they will still warm to you and be more open to your proposals.
- Mirroring the other person's mannerisms (e.g. hand and body movements). A study at a well-known Business School found that 67% of sellers who used mirroring achieved a sale compared to 12% who did not. People you mirror subconsciously feel more empathy with you.
However, it can be very embarrassing if the other person detects conscious mirroring so it must be very subtle. You need to leave a delay of between two and four seconds before the mirroring action.

- Try to remember the names of everyone you meet. It shows that you are treating them as an individual.

**Negotiating to Win:**
This involves pursuing your own interests to the exclusion of others: I win: you lose! Persuading someone to do what you want them to do and ignoring their interests: "keeping your cards hidden". Pressure selling techniques involve this. Whilst you might get short term gain, you will build up long term resentment which can be very disruptive if you ever need to work with these people again.

**Negotiating Jointly:**
This involves coming to an agreement where everyone gets what they want, reaching a mutually satisfactory agreement: win-win. In order to achieve this:

- You need to establish mutual trust, so it requires honesty and integrity from both parties.
- Both sides work together to come up with a compromise solution to suit everyone’s best interests.
- Each party tries to see things from the other’s perspective.
- Assertiveness is the best way here: being passive or aggressive doesn't help.

**A Strategy for Successful Negotiations:**

- Listen carefully to the arguments of the other party and assess the logic of their reasoning
- Clarify issues you are not clear about by asking how, why, where, when and what questions.
- List all the issues which are important to both sides and identify the key issues. Identify any personal agendas. Question generalisations and challenge assumptions.
- Identify any areas of common ground.
- Understand any outside forces that may be affecting the problem.
- Keep calm and use assertive rather than aggressive behaviour. Use tact and diplomacy to diffuse tensions.
- Remember: NO is a little word with big power!
- Use both verbal and non-verbal persuasion skills. Use open, encouraging body language such as mirroring, not defensive or closed.
- Know when to compromise. Offer concessions where necessary, but minor ones at first. Distinguish between needs: important points on which you can’t compromise and interests where you can concede ground. Allow the other party to save face if necessary via small concessions.
- Make sure there is an agreed deadline for resolution
- Decide on a course of action and come to an agreement.
- The final agreement needs to be summarised and written down at the conclusion of the negotiations.
• Plan for alternative outcomes if you can’t reach agreement.

The Speed of Trust – The Heart of Leadership

Trust as a foundation for high performance means just that: trust comes first. When we try to make the plan before the trust issues are resolved, we deal with symptoms rather than causes and repeating problems just change names.

Yes, you can order people to do things. But you run the risk of getting the salute and not the heart, gaining compliance and not the commitment.

Train People on How to Think

You can train people to think quality, to think service—but there’s a difference: whether these efforts come from trust and commitment, and whether they’re genuine. And that’s the difference that communicates to the market that makes people want to do business with you.

The concept of trust is simple: build on individual confidence and eliminate fear as an operating principle. The process is achievable; once we understand the emotions associated with trust and incorporate them into these four steps:

• Define what we mean by trust,
• Understand our blind spots,
• Communicate with intention, and,
• Produce. The conversion to a team mentality is difficult because effective teams must be predicated on trust.

Defining Trust

There are two parts to trust: a feeling part that indicates trust and a performance track record that confirms trust. An active feeling of trust is confidence: in leadership, in veracity, in reliability. A passive feeling of trust is the absence of worry or suspicion. Our most productive relationships are already based on trust, sometimes unrecognized and frequently taken for granted.

Trust, then, can be defined as confidence, the absence of suspicion, confirmed by track record and our ability to correct. The track record is only a confirmation of well-placed trust. If we define trust solely in terms of past events, we often consign ourselves to long periods of testing and sometimes stubborn unforgiveness. It is much more productive to correct mistakes and miscommunications to re-build trust starting now.

Blind Spots

Over our careers, each of us has collected a set of beliefs, world views and sweeping opinions, some of which are productive and some of which are not. The latter tend to be our blind spots.

All beliefs are formed from facts and assumptions. The blind spot beliefs are formed with two additional ingredients: fear and loss.

Centuries ago, for instance, the world got flat when societies observed facts, (the boat disappearing over a straight horizon), experienced fear and loss, (loved ones and survival necessities), and assumed there was a logical explanation using the available facts.
Similar blind spots accumulate for each of us in our careers. The sequence goes something like this: on an occasion when we are extending trust, often contributing extra, something happens which leaves us feeling burnt, or betrayed. The emotional response is immediate: shock, fear, loss, anger. The mental reaction is a “never again” decision that affects trust. These decisions are logical, but are often categorical, over-protective, and therefore limiting.

If we have a “betrayal” event with one boss, for instance, we may unconsciously conclude that all bosses of that “type” are untrustworthy, or that we ourselves are generally vulnerable, naive, or otherwise disabled. When these decisions are “unremembered,” they result in limitation: future bosses (or corporations, or whatever category) may be fighting hidden barriers to trust. We sometimes “protect” ourselves further by unconsciously reducing our motivation to do extra, to be flexible with the times, or to take appropriate risks.

Since virtually all of us carry similar “trust screens,” we can expect some over-reaction and misunderstanding from others’ blind spots as well as our own. The resulting confusion can lead to unproductive and sometimes amusing “solutions to the problem”: analysing each other, seeking solace in categorizing people, trying to “fix” our associates. While changing each other remains futile, changing interaction dynamics from non-trust to trust is achievable. The pathway is communication.

**Communicate with Intention**

Successful trust-building hinges on three components of communication: intention, preparation, and mechanics. Building trust is vastly different from trying to establish who is right. The differences are obvious in how the parties communicate. The two keys to trust-building communication are committing to find win/win strategies even if the starting point is clearly not trust, and arriving at defined, accountable outcomes.

**Preparation**

First, list the important misunderstandings or frustrations from your perspective. Think through to some possible win/win outcomes. But rather than take positions at this point, identify the general substance of each interest.

Next, look at what you have been trying to contribute:

- Have you felt blocked?
- Forced?
- Excluded?

Take an honest look. Might your intended partner fall into one of your “trust screen” prejudices? Are some of your reactions “knee jerk,” over-emotional, or somehow familiar? Might it make sense to extend benefit of the doubt in some specific instance? What has been your participation in the problem, or in allowing the problem to remain unresolved? For example, are you avoiding the problem while it grows underfoot? Pretending the problem matters less than it does, while stress subliminally builds?
Omitting communications because "it should be obvious?" If you feel your contribution is being thwarted, has your reaction exacerbated the problem, and if so, how? What could you do instead?

**Mechanics**

How a sensitive communication begins is important. Successful conversations usually start with tact, a win/win intent, and even a sincere and disarming admission that you have been part of the roadblock.

Eliciting willingness (to listen, to speak frankly) builds mutual respect; demanding attention ("we need to talk") builds suspicion.

Private communications build confidence; public scenes build walls. Non-assumptive questions are important tools for eliciting willingness ("How are we doing on our timeline" vs. "Why are your reports always late"). Listening accurately means separating the act of receiving information from the act of judging that information. While both processes are critical, prematurely communicating judgment (e.g., abrupt interruptions, restlessness, a frown) invites changes in the message itself.

When listening is compromised, we lose diversity of viewpoint and reduce our intelligence. Closure means not leaving any unnecessary question marks after communication.

Closure is critical to building trust; dangling voids are susceptible to later negativity. Make a point to close every interest and every suggestion in some form. When an answer isn't available, set a time and a plan for a more thorough response.

When only action will supply an answer, share the risk and set end-points together.

**Produce a Win/Win Attitude**

With this type of communication, attitudes convert to win/win. The next step is to frame the action, distribute the responsibilities and accountabilities, provide and secure the required support.

Again, the sequence is critical. Resolve the trust issues first, then create and execute the strategies. Remember that slipped commitments do not necessarily mean false commitments. Handle slippage by building trust. Rather than be accusatory, ask "what happened?" in a neutral fashion, and mean it. Listen carefully, correct collaboratively, and choose alternative resources when necessary.

Most important, sincerely acknowledge increasing productivity. In this way, we continuously learn what success is and how to expand it.

Trust is the basis for our drive to contribute. The basis of mistrust is fear, but fear is also a requirement for survival. If we didn't have a "hot stove" protection mechanism, we'd be getting burned daily. But as we see, not touching the hot stove sometimes goes to the extreme of not even going into the kitchen.

We need to recognize fear, yet not base our actions or our organisational systems on fear. The occasional "betrayal" experience is unavoidable in a productive career. While the pain is real, the experiences also produce valuable lessons. The cost further diminishes compared to the cynicism, inflexibility and risk-aversion that results from never extending trust. This is true particularly when we examine the enormous profits that a confident and trusting approach will garner.
The team that competently manages its members’ desire to contribute is already building trust. This involves an improved understanding of ourselves. We must recognize our blind spots in order to tip the balance away from fear and toward our vital and vulnerable desire to better things.
SECTION 3; PRACTISING EFFECTIVE MANAGEMENT

The Essentials of Management

In any organisation, whether it is a government department, a non-profit organisation, a small business or a company, a key factor to success is management. The process of management is used for the organisation to achieve its goals and objectives. The way that an organisation is managed may differ from one place to another; however the study of management tells us that it will always include the following elements:

**Figure 7: Elements of Management**

![Diagram of management elements](image)

**Essentials of Management 1 = Planning**

One of the most common sets of activities in the management is planning. Very simply put, planning is setting the direction for something -- some system -- and then guiding the system to follow the direction. There are many kinds of planning in organisations. Common to these many kinds of planning are various phases of planning and guidelines for carrying them out as effectively as possible. To help make the following information applicable to as many situations as possible, the scope of the following planning information is to the "system", which is fully explained below. Systems have inputs, processes, outputs and outcomes. To explain, inputs to the system include resources such as raw materials, money, technologies and people. These inputs go through a process where they're aligned, moved along and carefully coordinated, ultimately to achieve the goals set for the system. Outputs are tangible results produced by processes in the system, such as products or services for consumers. Another kind of result is outcomes, or benefits for consumers, e.g., jobs for workers, enhanced quality of life for customers, etc. Systems can be the entire organisation, or its departments, groups, processes, etc. Whether the system is an organisation, department, business, project, etc., the process of planning includes planners working backwards through the system. They start from the results (outcomes and outputs) they prefer and work backwards through the system to...
identify the processes needed to produce the results. Then they identify what inputs (or resources) are needed to carry out the processes.

Some important definitions to note are:

**GOALS:** Goals are specific accomplishments that must be accomplished in total, or in some combination, in order to achieve some larger, overall result preferred from the system, for example, the mission of an organisation. (Going back to our reference to systems, goals are outputs from the system.)

**STRATEGIES/ACTIVITIES:** These are the methods or processes required in total, or in some combination, to achieve the goals. (Going back to our reference to systems, strategies are processes in the system.)

**OBJECTIVES:** Objectives are specific accomplishments that must be accomplished in total, or in some combination, to achieve the goals in the plan. Objectives are usually "milestones" along the way when implementing the strategies.

**TASKS:** Particularly in small organisations, people are assigned various tasks required to implement the plan. If the scope of the plan is very small, tasks and activities are often essentially the same.

**RESOURCES AND BUDGETS:** Resources include the people, materials, technologies, money, etc., required to implement the strategies or processes. The costs of these resources are often depicted in the form of a budget. (Going back to our reference to systems, resources are input to the system.)

**Basic Overview of the Typical Phases in Planning:**

Whether the system is an organisation, department, business, project, etc., the basic planning process typically includes similar nature of activities carried out in similar sequence. The phases are carried out carefully or -- in some cases -- intuitively, for example, when planning a very small, straightforward effort. The complexity of the various phases (and their duplication throughout the system) depends on the scope of the system. For example, in a large corporation, the following phases would be carried out in the corporate offices, in each division, in each department, in each group, etc.

**Reference Overall Singular Purpose ("Mission") or Desired Result from System:** During planning, planners have in mind (consciously or unconsciously) some overall purpose or result that the plan is to achieve. For example, during strategic planning, it's critical to reference the mission, or overall purpose, of the organisation.
Take Stock Outside and Inside the System: This "taking stock" is always done to some extent, whether consciously or unconsciously. For example, during strategic planning, it's important to conduct an environmental scan. This scan usually involves considering various driving forces, or major influences, that might affect the organisation.

Analyse the Situation: For example, during strategic planning, planners often conduct a "SWOT analysis". (SWOT is an acronym for considering the organisation's strengths and weaknesses, and the opportunities and threats faced by the organisation.) During this analysis, planners also can use a variety of assessments, or methods to "measure" the health of systems.

Establish Goals: Based on the analysis and alignment to the overall mission of the system, planners establish a set of goals that build on strengths to take advantage of opportunities, while building up weaknesses and warding off threats.

Establish Strategies to Reach Goals: The particular strategies (or methods to reach the goals) chosen depend on matters of affordability, practicality and efficiency.

Establish Objectives Along the Way to Achieving Goals: Objectives are selected to be timely and indicative of progress toward goals.

Associate Responsibilities and Time Lines with Each Objective: Responsibilities are assigned, including for implementation of the plan, and for achieving various goals and objectives. Ideally, deadlines are set for meeting each responsibility.

Write and Communicate a Plan Document: The above information is organized and written in a document which is distributed around the system.

Acknowledge Completion and Celebrate Success: This critical step is often ignored -- which can eventually undermine the success of many of your future planning efforts. The purpose of a plan is to address a current problem or pursue a development goal. It seems simplistic to assert that you should acknowledge if the problem was solved or the goal met. However, this step in the planning process is often ignored in lieu of moving on the next problem to solve or goal to pursue. Skipping this step can cultivate apathy and scepticism -- even cynicism -- in your organisation. Don't skip this step.

Guidelines to Ensuring Successful Planning and Implementation
A common failure in many kinds of planning is that the plan is never really implemented. Instead, all focus is on writing a plan document. Too often, the plan sits collecting dust on a shelf. Therefore, most of the following guidelines help to ensure that the planning process is carried out completely and is implemented completely -- or, deviations from the intended plan are recognized and managed accordingly.
Involve the Right People in the Planning Process: Going back to the reference to systems, it's critical that all parts of the system continue to exchange feedback in order to function effectively. This is true no matter what type of system. When planning, get input from everyone who will responsible to carry out parts of the plan, along with representative from groups who will be affected by the plan. Of course, people also should be involved in they will be responsible to review and authorize the plan.

Write Down the Planning Information and Communicate it Widely: New managers, in particular, often forget that others don't know what these managers know. Even if managers do communicate their intentions and plans verbally, chances are great that others won't completely hear or understand what the manager wants done. Also, as plans change, it's extremely difficult to remember who is supposed to be doing what and according to which version of the plan. Key stakeholders (employees, management, board members, funders, investor, customers, clients, etc.) may request copies of various types of plans. Therefore, it's critical to write plans down and communicate them widely.

Goals and Objectives Should Be SMARTER: SMARTER is an acronym, that is, a word composed by joining letters from different words in a phrase or set of words. In this case, a SMARTER goal or objective is:

- **Specific:** For example, it's difficult to know what someone should be doing if they are to pursue the goal to "work harder". It's easier to recognize "Write a paper".
- **Measurable:** It's difficult to know what the scope of "Writing a paper" really is. It's easier to appreciate that effort if the goal is "Write a 30-page paper".
- **Acceptable:** If I'm to take responsibility for pursuit of a goal, the goal should be acceptable to me. For example, I'm not likely to follow the directions of someone telling me to write a 30-page paper when I also have to five other papers to write. However, if you involve me in setting the goal so I can change my other commitments or modify the goal, I'm much more likely to accept pursuit of the goal as well.
- **Realistic:** Even if I do accept responsibility to pursue a goal that is specific and measurable, the goal won't be useful to me or others if, for example, the goal is to "Write a 30-page paper in the next 10 seconds".
- **Time frame:** It may mean more to others if I commit to a realistic goal to "Write a 30-page paper in one week". However, it'll mean more to others (particularly if they are planning to help me or guide me to reach the goal) if I specify that I will write one page a day for 30 days, rather than including the possibility that I will write all 30 pages in last day of the 30-day period.
- **Extending:** The goal should stretch the performer's capabilities. For example, I might be more interested in writing a 30-page paper if the topic of the paper or the way that I write it will extend my capabilities.
- **Rewarding:** I'm more inclined to write the paper if the paper will contribute to an effort in such a way that I might be rewarded for my effort.
Build in accountability (Regularly review who’s doing what and by when?): Plans should specify who is responsible for achieving each result, including goals and objectives. Dates should be set for completion of each result, as well. Responsible parties should regularly review status of the plan. Be sure to have someone of authority "sign off" on the plan, including putting their signature on the plan to indicate they agree with and support its contents. Include responsibilities in policies, procedures, job descriptions, performance review processes, etc.

Note Deviations from the plan and re-plan accordingly: It’s OK to deviate from the plan. The plan is not a set of rules. It’s an overall guideline. As important as following the plan is taking note of deviations and adjusting the plan accordingly.

Evaluate planning process and the plan: During the planning process, regularly collect feedback from participants. Do they agree with the planning process? If not, what don’t they like and how could it be done better? In large, on-going planning processes (such as strategic planning, business planning, project planning, etc.), it’s critical to collect this kind of feedback regularly.

During regular reviews of implementation of the plan, assess if goals are being achieved or not. If not, were goals realistic? Do responsible parties have the resources necessary to achieve the goals and objectives? Should goals be changed? Should more priority be placed on achieving the goals? What needs to be done? Finally, take 10 minutes to write down how the planning process could have been done better. File it away and read it the next time you conduct the planning process.

Recurring planning process is at least as important as the plan document: Far too often, primary emphasis is placed on the plan document. This is extremely unfortunate because the real treasure of planning is the planning process itself. During planning, planners learn a great deal from on-going analysis, reflection, discussion, debates and dialogue around issues and goals in the system. Perhaps there is no better example of misplaced priorities in planning than in business ethics. Far too often, people put emphasis on written codes of ethics and codes of conduct. While these documents certainly are important, at least as important is conducting on-going communications around these documents. The on-going communications are what sensitize people to understanding and following the values and behaviours suggested in the codes.

Nature of the process should be compatible to nature of planners: A prominent example of this type of potential problem is when planners don’t prefer the "top down" or "bottom up", "linear" type of planning (for example, going from general to specific along the process of an environmental scan, SWOT analysis, mission/vision/values, issues and goals, strategies, objectives, timelines, etc.)

Critical -- but frequently missing Step -- acknowledgement and celebration of results: It's easy for planners to become tired and even cynical about the planning process. One of the reasons for this problem is very likely that far too often, emphasis is placed on achieving the results. Once the desired
results are achieved, new ones are quickly established. The process can seem like having to solve one problem after another, with no real end in sight. Yet when one really thinks about it, it's a major accomplishment to carefully analyse a situation, involve others in a plan to do something about it, work together to carry out the plan and actually see some results. So acknowledge this -- celebrate your accomplishment.

**Essentials of Management 2 = Organising**

Organising becomes the process of establishing orderly uses for all resources within a management system. As a manager, you need to use the organising function as the primary mechanism to activate plans for using your resources.

This leads to:

- Creating and maintaining relationships between all of the organisation’s resources.
- Defining which resources need to be used for which projects.
- Determining when, where and how the resources will be used.
- Minimizing cost overruns, duplication of efforts, and idle organisational resources.

**The Process of Organising**

In the overall management system, there are five steps that managers have to continually repeat in order to ensure that organising is as efficient as possible:

- Reflecting on plans and objectives
- Establishing major tasks
- Dividing major tasks into subtasks
- Allocating resources and directives for subtasks
- Evaluating results of organising strategy

Through repetition of the above five areas, a manager is able to receive feedback about the organising efforts. Because planning involves determining how the agency will attain its objectives, and organising involves determining how the agency’s resources will be used to activate plans, the manager must start to organize by understanding planning.

The second and third steps of the organising process focus on tasks to be performed within the management system. The manager must designate major tasks or jobs to be done within the service. Such tasks may include station location, protocol development, equipment to be carried, and level of staff certification. These tasks must then be divided into subtasks.

The fourth step involves providing enough resources for the staff to accomplish the tasks.

And the fifth step is in many ways, the most important – the feedback you gather furnishes information on how well the strategy is accomplishing the goals. And that’s the key element – accomplishing your goals!

Organising, like planning, can also be viewed as a subsystem of the overall management system that contains three building blocks: input, process and output. Every action and reaction you take as a manager has to work through these areas in order to achieve the organisation’s goals. The input area
of the system looks at the organisation’s human resources, money, suppliers, and machinery/tools to get the job done. Within the process area, there is an organising subsystem that repeats the five steps above. The third step is the output, which is the organisation as a whole.

**Organisational Theories**

Study and discussion of management practices started in the early 20th century. Many of the early researchers treated organising as a subset of general management.

The traditional Principles of Organisation are:

- **A well-defined hierarchy of authority**: This ensures a coordinated approach to achieving organisational goals.
- **Unity of command**: This ensures that each individual in the organisation only reports to one supervisor, thus reducing conflicts in project and/or production management.
- **Authority equal to responsibility**: These two issues go hand-in-hand – if you have the responsibility to produce something for the organisation, then you need the authority to gather and use the necessary resources. Never accept responsibility without authority.
- **Downward delegation of authority but not responsibility**: Ever hear the term “the buck stops here”? It comes from the principle that a superior can pass on the right to get something accomplished to a subordinate, but the obligation to getting it done remains with the supervisor.

Division of labour is one classical area that all managers need to review. Division of labour relates to the assignment of various portions of a particular task among a number of organisational members. We need to divide tasks so that the work is not burdensome. This issue is frequently discussed in our career field by those who believe that dually trained fire-fighter/paramedics have challenges maintaining a high level of proficiency in their tasks. For such delivery systems, managers need to be clear about the expectations and time commitments necessary to maintain a high skill level.

**Essentials of Management 3 = Controlling**

You may think that to be a “controlling manager” is bad, but you need to have this skill. You need to be able to make something happen the way it’s supposed to happen. Controlling allows you to compare performance to pre-determined standards.

Controlling generally involves three steps:

- **Measure performance**: The two central questions here are “How to Measure?” to measure and “What to Measure?”
- **Compare Measured Performance to Standards**: Here, you’ll want to measure standards in productivity, quality improvement, product leadership, employee development and attitudes, and social responsibility. You may also want to measure standards that review the balance between short and long-range goals.
- **Take Corrective Action**: The two steps here are to recognize the symptoms and recognize the problems. You may have either together or only one.
There are three types of control you can utilise to make your organisation stronger:

- **Pre-control**, which takes place before a unit of work is performed;
- **Concurrent control**, which takes place as some unit of work is being performed; and
- **Feedback control**, which takes place after the work is performed.

When utilising control, you’ll need to exert some power. In other words, how can you best influence others so that they respond to you? As a manager, you’ll have two types of power: position power and personal power. Add these together and you get the sum known as total power. Before reading further, take a moment to reflect on power. Would you rather be stronger with your position power or personal power? I hope you answered personal power. Great managers, and all leaders (there’s a difference between the two that we’ll look at in a future column), have strong personal power which is derived from your relationship with others. Position power is that power that simply comes with your position.

If you feel weak in personal power, you can improve it by developing the following attitudes in your employees:

- A sense of obligation and identification with you. In other words, teamwork and esprit-de-corps!
- A belief that the manager possesses a high level of expertise within the organisation. You need to know what you are doing! It’s easy to say, but sometimes very hard to do. Your employees want to have confidence in you and your abilities.
- A sense of identification with you and a sense of perception that they are dependent on you. You are their manager, so you need to manage them! This type of control leads to a better organisation and accomplishment of the goals.

Making control successful through your personal and position power can best be accomplished by focusing on your staff’s activities and how they support the overall organisational goals, recognizing that there are different goals throughout the other parts of the organisation, taking timely corrective action, and employing the three C’s: Communicate, Communicate, Communicate!

**Tools of Control**

- **Budgets** – creating a budget or target sheet are part of the planning process, but are very useful as a control instrument.
- **Performance Reports** – well-structured performance reports are an important source of control information. E.g. call reports of sales people, production reports. Keep reports simple and to the point. Foster a climate of full and accurate reporting.
- **Personal observation** - Spend time with employees and observe what is going on. Listen to employees; help them discover better ways of working. Observation gives insight into the activities behind the reports.
The Top Ten Qualities of an Excellent Manager

An excellent manager taps into talents and resources in order to support and bring out the best in others. An outstanding manager evokes possibility in others.

1. **Creativity**: Creativity is what separates competence from excellence. Creativity is the spark that propels projects forward and that captures peoples' attention. Creativity is the ingredient that pulls the different pieces together into a cohesive whole, adding zest and appeal in the process.

2. **Structure**: The context and structure we work within always have a set of parameters, limitations and guidelines. A stellar manager knows how to work within the structure and not let the structure impinge upon the process or the project. Know the structure intimately, so as to guide others to effectively work within the given parameters. Do this to expand beyond the boundaries.

3. **Intuition**: Intuition is the capacity of knowing without the use of rational processes; it’s the cornerstone of emotional intelligence. People with keen insight are often able to sense what others are feeling and thinking; consequently, they’re able to respond perfectly to another through their "deeper understanding." The stronger one's intuition, the stronger manager one will be.

4. **Knowledge**: Thorough knowledge base is essential. The knowledge base must be so ingrained and integrated into their being that they become transparent, focusing on the employee and what s/he needs to learn, versus focusing on the knowledge base. The excellent manager lives from a knowledge base, without having to draw attention to it.

5. **Commitment**: Manager is committed to the success of the project and of all team members. S/he holds the vision for the collective team and moves the team closer to the end result. It's the manager's commitment that pulls the team forward during trying times.

6. **Being Human**: Employees value leaders who are human and who don't hide behind their authority. The best leaders are those who aren't afraid to be themselves. Managers who respect and connect with others on a human level inspire great loyalty.

7. **Versatility**: Flexibility and versatility are valuable qualities in a manager. Beneath the flexibility and versatility is an ability to be both non-reactive and not attached to how things have to be. Versatility implies an openness, this openness allows the leader to quickly *change on a dime* when necessary. Flexibility and versatility are the pathways to speedy responsiveness.

8. **Lightness**: Stellar manager doesn't just produce outstanding results; s/he has fun in the process! Lightness doesn't impede results but rather, helps to move the team forward. Lightness complements the seriousness of the task at hand as well as the resolve of the team, therefore contributing to strong team results and retention.

9. **Discipline/Focus**: Discipline is the ability to choose and live from what one pays attention to. Discipline as self-mastery can be exhilarating! Role model the ability to live from your intention consistently and you’ll role model an important leadership quality.
10. **Big Picture, Small Actions:** Excellent managers see the big picture concurrent with managing the details. Small actions lead to the big picture; the excellent manager is skillful at doing both: think big while also paying attention to the details.

**Interviewing and Selection Skills**

Interviewing should be taken seriously and anyone undertaking an interview must be prepared. Learn ways to run a more effective interview, asking great questions that can keep candidates on their toes, and allow you to learn more about your prospects. Your business depends on your ability to make a good hire. But making a good hire is not exactly an easy task. After sorting through resumes and selecting the few choice candidates considered worth your time is only half the battle. Often the hardest part of the hiring process is conducting a job interview that differentiates between who the candidate wants you to see and who is really sitting across from you.

Below are five keys to helping you conduct a better job interview and questions you can ask candidates to keep them on their toes:

1. **Do your homework:**
   - You expect the candidate to walk in to your office with some knowledge of who your company is and what it is you do, right? It's in your best interest to prepare for the interview as well. Going into the interview, you should have already studied the candidate you are about to meet face-to-face. The least you could do is to become familiar with his or her resume, cover letter, and any other materials that were submitted to you for consideration of the job. Before the interview is also the appropriate time to Google your candidate to see if anything interesting pops up. You should also find out if they have a MySpace or Facebook page, and if so, what type of content appears on those pages. You might find something that does not mix with your culture or morals. The benefit of doing your homework beforehand is that you don't waste too much of your interview time going through these materials together. You come in to the interview with questions or comments on their experience, background, work, and can spend the entire interview getting to know more about the real candidate, and not who they are on paper.
   - Some interesting icebreakers to kick off the interview are:
     - "How about those (insert local sports team here)?"
     - "What do you think about this weather, huh?"
     - "Did you have any problem finding the place?"

2. **Don't Rush to Judgment:**
   - So often we base our opinion on someone by their appearance or the impression we get of that candidate within the first few minutes of meeting them. The problem with this is that it clouds our heads, and if your first impression is not a favourable one, it is an uphill climb for the candidate without them even knowing it. Stop doing this! When a candidate enters your office for a job interview do whatever it takes to not form an immediate opinion of them. If it helps, say to yourself...
that you believe this candidate to be a certain a way, and then flush this out of your head any way you know how. Give the candidate a clean slate and let their talents and qualifications (or lack thereof) form your opinion. You don't want to blow off a potential top talent because his or her appearance reminds you of a neighbour you didn't like growing up.

A few good secondary questions to ask now are:
- "Tell me about your last job."
- "Tell me about a time when you did something that was a huge success."
- "Why did you become a (insert title of position here) in the first place?"

3. Study Behaviour
Asking behavioural questions requires candidates to draw upon their background and experiences to describe how they used skills that are relevant to your position. Their resume may be filled with "I'm a team player," "Organized," "Multi-Tasking," and "Born Leader," but anyone can include this on their resume. Asking questions that force candidates to speak about these traits enables you to discover whether or not they do in fact possess them. Be sure to ask plenty of these questions right in the middle of the interview and score your candidates on how quickly they respond and the amount of tap dancing they do. But be careful – if it sounds too rehearsed then chances are it is.

Behavioural questions to ask:
- "Tell me about a time when you took charge of a situation and made something positive happen."
- "Describe a situation when you were given a tight deadline to perform, and tell me how you managed to get it all done."
- "Talk about when you had to deal with a co-worker that was hard to get along with. How did you get along with them?"

4. Change Things Up
You're past the halfway point of conducting a better job interview, so now is the time to get a little bit crazy. Ask the candidate a question that has no right or wrong answer. It could be why the sky is blue or why grass is green? It could even be why do worms not have eyes? Whatever your question, judge your candidate on how well they answer and if they are thrown for a curve or not. If they stay on the ball and answer as if it was expected then you have a pretty sharp candidate sitting across from you. Even if they laugh a bit at first but manage to form a pretty good answer, you know you have someone who can improvise and react to situations. If they stumble about and seem completely flustered, you have to wonder about the candidate's ability to respond to pressure seeing as the candidate has a hard time speaking off the cuff. Remember, these questions are not meant to derive a correct answer. The purpose is only to gauge the candidate's reaction to a tricky situation.
Great abstract questions to ask:

- "If nothing ever sticks to a Teflon pan, then how do they make Teflon stick to the pan?"
- "Can a fish drown?"
- "Why are there interstate highways in Hawaii?"

5. **Maintain a Consistent Evaluation Process**

Just because you’ve concluded your face-to-face job interview, doesn’t mean the process is over. Go back and examine the answers to your questions and score these answers against a guide that makes it easy for you to judge. This guide needs to be somewhat flexible as there is not an exact answer for qualitative data, but you can form a set of guidelines for what the ideal answer would be. Having a set guide makes it easier for you to fairly judge each candidate's response and select a candidate that fits your company's needs. You should be well on your way to making a better hire after following these five steps for conducting a better interview.

![Figure 8: Selection and Recruitment Process](image)

**Running Effective Meetings**

Why have Meetings? These reasons overlap, but are different. A project meeting in which representative from several teams report what each team is doing is very different from one in which the team representatives together decide the future direction of the project. An annual general meeting to transact the minimum legal requirements of receiving annual report and accounts, appointing the auditor and electing the committee has to be planned differently from one
which will also include a wide-ranging discussion on the project’s future direction (and will this discussion be consultative or decision-making?) and a social event.

The terms of reference for a committee, subcommittee or other group will define what issues or topics can be covered at meetings and whether the purpose is informative, consultative, decision-making or a combination.

A group with clear terms of reference is less likely to make decisions another group thinks it should be making.

There are broadly five reasons for having meetings:

1. **Information**: to share information about what has happened or is going to happen;
2. **Consultation**: to get participants’ views or proposals about what should happen, but without the meeting having power to make a decision;
3. **Business/decision-making**: to discuss what the group should do and how it should be done, and make decisions on the basis of those discussions;
4. **Legal**: to carry out business which must legally (according to legislation or the organisation’s constitution) be transacted;
5. **Education**: to learn about a topic of relevance to the group, for example by having a speaker, video or discussion; social/support: to be with friends, share an interest or support

**How do you prepare for a Meeting:**

- Prepare all documents needed for the meeting long before the meeting.
- Pick the right time and place for the meeting.
- Arrange the venue in advance.
- Give enough warning of the meeting.
- Check matters arising from previous meeting.
- Set time limits for the meeting.

**Some Tips on Running Weekly Team Meetings**

Guidelines for successful weekly staff meetings include the following:

- Dates and times should be planned and communicated in advance and entered on the year plan
- All staff members should attend
- All members should be encouraged to participate in discussions
- Administrative staff (e.g. secretaries) may be invited to attend
- Specific members may be requested to present, lead discussions or share information with the staff
- Should members wish to have items added to the agenda, it should be communicated to the chair or executive committee for placement on the agenda for the next general meeting
- An agenda drawn up by management should be circulated to all staff prior to the meeting.
• No further items should be added to the agenda during a general staff meeting
• All matters discussed at staff meetings should be regarded as confidential
• The principles of democratic, participatory management and shared decision-making should be encouraged and decisions should preferably be taken by consensus
• The chairperson reserves the right to make the final decision
• Time consuming debates and contentious items could be referred to task teams with a mandate to make recommendations for further consideration at the following meeting

Arrangements Prior to the Meeting
The chairperson and the secretary play the key roles in getting ready for any meeting. They need to ensure that each member is also prepared before attending the meeting. It is very important that every meeting is well prepared.

Here’s how you can do it:

1. Prepare all documents needed for the meeting long before the meeting.
   These may include:
   • Agenda – a list of the items that need to be discussed at the meeting. You can make time at one meeting to work out what must go on the agenda at the next meeting. The final agenda can be completed by the chairperson or the executive committee.
   • All members can contribute to the agenda, possibly using a chart like this:
   • Each meeting must be recorded in Minutes, i.e. an official record of the meeting. Minutes of the previous meeting are usually read in the meeting to remind members of decisions taken and if the decisions are acted upon.
   • Any other reports that may be needed in the meeting. This may include financial statements or reports from committees.

2. Pick the right time and place for the meeting
   • Everyone should be happy with the time and place of the meeting. Avoid times that the majority of the people can’t attend.
   • Remember you should always try to get a quorum.

3. Arrange the venue in advance
   • Arranging where the meeting is going to take place at the last minute can cause a loss of time and be confusing.
   • It is best to tell the members where the meeting is going to be when you send them their notice of the meeting.
   • Make sure that the venue is comfortable and that there are pens, paper and something to drink.

4. Give enough warning of the meeting
   • Those who should attend the meeting need to know some time before when the meeting is going to happen.
   • You can also send the agenda, minutes of the previous meeting, and any other reports that members need to prepare for the meeting.
• You can even set the dates and times for meetings for the year. This way everyone knows exactly when they are and can put them in their diaries.

5. **Check matters arising from the previous meeting**
   • These are issues that need further discussion from the previous meeting. These are usually issues that needed further investigation.

6. **Set time limits for the meeting**
   • Make sure everyone knows how long the meeting is going to last so they can come on time and stay until the end.

**Logistics - planning and organising your meeting or training activity**

**The Meeting Room:** Someone else, usually an administrative clerk, often books the meeting room. We recommend you spend time discussing this thoroughly with this person. People get into the habit of doing things the same old way and often put up with less than satisfactory arrangements. You'll discover most administrative staff are very open to your advice and want to help you make your meeting or workshop a success!

One of the most important things during a meeting or workshop is for everyone to be able to see and hear everything that's going on. Otherwise you'll lose them and their good ideas. The room should support good projection for your tools. If you're using a computer display, make sure that the contents are large enough and coloured correctly for everyone to see easily.

Make sure you have a good meeting room with good lighting and which is warm enough. If possible, visit the room before the session and make necessary adjustments to lighting and the size and colours of your display your posters etc. If you're going to be using flip chart paper, be sure that there's plenty of wall space to display all products during the session.

**Equipment, Supplies and Support:** You need to ensure that your equipment, supply and support needs are provided for. The following lists identify the most commonly needed items. We suggest you provide a list of your needs to the person organising the logistics for the meeting or workshop and do your best to ensure that you have everything you need. It is not always necessary to have everything due to budgetary constraints, and the type of meeting or workshop.

<table>
<thead>
<tr>
<th>EQUIPMENT CHECKLIST</th>
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</thead>
<tbody>
<tr>
<td>Flipchart Easels</td>
</tr>
<tr>
<td>Projector</td>
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<tr>
<td>Screen</td>
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<tr>
<td>Television</td>
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<td>Printers</td>
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<tr>
<td>Extra Tables for Group Work</td>
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</tbody>
</table>
SUPPLY CHECKLIST

<table>
<thead>
<tr>
<th>Items</th>
<th>Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copies of the slides</td>
<td>Blank Paper</td>
</tr>
<tr>
<td>Extra Flip Chart Paper</td>
<td>Folders</td>
</tr>
<tr>
<td>Big Marker Pens (Different colours)</td>
<td>Coloured Pens</td>
</tr>
<tr>
<td>Masking &amp; Sticky Tape</td>
<td>Pens &amp; Pencils</td>
</tr>
<tr>
<td>Scissors</td>
<td>Stapler</td>
</tr>
<tr>
<td>Whiteboard Markers &amp; Erasers</td>
<td>Post It Notes</td>
</tr>
</tbody>
</table>

SUPPORT CHECKLIST

<table>
<thead>
<tr>
<th>Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>A person to record the session</td>
</tr>
<tr>
<td>A refreshment table in the room providing light snacks and drinks</td>
</tr>
<tr>
<td>Transportation for participants if necessary</td>
</tr>
<tr>
<td>Travel arrangements for participants if necessary</td>
</tr>
</tbody>
</table>

How to Arrange a Room

There are several choices for setting up the room for optimal communications. Room arrangements set expectations and can create a more comfortable, relaxed feeling among the participants. Clustered seating encourages collaborative interactions among group members.

The most commonly used arrangement is a U-shaped table for participants with the facilitator working at the open end of the U. This arrangement is important for democratic, drop-the-rank interaction. Everybody can see the faces of the other participants and there aren't built-in power positions at the table. While the U is optimal for most meetings, sometimes there are too many people for the U and you may have to deviate somewhat. If you need a U-shaped configuration, hold out for a room that can support it.

Standard Items on an Agenda

An agenda usually includes the following items, which also show the order of business:

- **Date and Time of meeting**
- **Venue**
- **Attendance: Present**
  - Only apologies which have been received are noted.
  - Note: the chairperson must check if a quorum is present. The constitution of the organisation usually defines what constitutes a quorum. If enough members are present to constitute a quorum, the meeting is legal. If there are not enough members present, the meeting can wait for more members to arrive or the meeting can continue to discuss urgent matters. However, any decisions taken must be ratified by a later meeting where a quorum is present.
- **Adoption of the Agenda**
  - The agenda is read. If someone wants to amend the agenda, and the other members agree, this may be done.

- **Minutes of the Last meeting**
  - The minutes of the previous meeting are read. If there are corrections, these are noted by the secretary. If there are no corrections the minutes are approved.

- **Matters Arising**
  - Members report on progress made on specific matters since the last meeting. Members may report on the outcomes of actions, which were noted in the minutes of the previous meeting.

- **Reports from Sub-committees**
  - If there are sub-committees, the co-ordinator of each sub-committee will report on progress.

- **Financial Report**
  - The treasurer presents a report on any money received or money spent. Any payments that must be made are presented and approved by the meeting.

- **New Business**
  - The member concerned presents any new matters, which should be discussed by the committee.

- **General**
  - This section is for announcements that must be made.

- **Date of next meeting**

The chair utilising this list to:

- Go through all the actions before the meeting and phone or visit people to check if they have fulfilled their responsibilities from the previous meeting and offer assistance or support
- Follow up, at the next meeting, to ensure that all actions have been carried out.
- In this way important decisions are always followed up. Your agenda thus becomes the backbone of your minutes. Use the agenda headings to write your minutes.

### Conducting Meetings

A meeting is when two or more people come together to discuss matters of mutual concern, and thereafter take any necessary action. The main purpose of a meeting is to have discussions on important issues, problem solve and make decisions. Meetings also offer everyone the chance to voice their opinion on various issues, which ensures that members of staff are able to participate in decision making. Meetings should be conducted in a structured and efficient manner. If not, you run the risk of wasting time and creating a lot of unnecessary frustration.
Here are a few tips on running effective meetings:

The person chairing the meeting should:

- Prepare and issue a notice and an agenda
- Start the discussion and aim to get everyone to participate
- Control the pace of the meeting and make sure the meeting concludes on time
- Make sure that when an agenda item is resolved, that it is clear who will take any necessary action (this should also appear in the minutes)
- Summarize discussion points at the end of each section
- Ensure that all participants receive minutes promptly

Communication and Meetings

The importance of a good communication system in any organisation cannot be underestimated. Good communication can help you to solve problems, give clear instructions, resolve conflicts diplomatically, motivate colleagues, persuade people to take action and more. Most of us do not give much thought to how we communicate until something goes wrong. Poor communication can lead to misunderstandings, which can lead to lower productivity and poor interpersonal relationships. Therefore, a good system of communication is vital to ensure that your organisation functions properly.

The elements of communication: As you can see in the above definition, communication is a two-way process. This means that it is an on-going and dynamic process. The communication process consists of six main elements, which we will discuss by first looking at the scenario below.

- **Sender**: (who?) The person or group that initiates the communication, and who encodes and transmits the message. E.g. The manager
- **Receiver**: (to whom?) The person or group to whom the message is being sent; they decode or interpret the message. E.g. The secretary
- **Message**: (what?) What you are trying to say or the meaning that you are trying to get across. E.g. “What time is our meeting scheduled for tomorrow?”
- **Channel**: (how?) The method by which the message is sent e.g. face-to-face, letter, fax or radio broadcast etc. E.g. Telephone
- **Feedback**: (with what effect?) This is the message that the receiver sends back to the sender as a response. Feedback can indicate how well the message is understood and can be verbal or nonverbal such as a nod. E.g. The meeting is at 3pm.
- **Noise**: (what gets in the way of the message being understood?) This refers to any interference or obstacle to the receiver understanding the message. E.g. The telephone line breaking up
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  - Ensure that all participants receive minutes promptly

Secrets to Successful Business Meetings
Have you ever felt that meetings were not just going your way? You know your ideas are good, you know you should win that contract or secure new business, but for some reason you’re just not getting your point across. Well, there are a number of psychological techniques you could use that will make sure your ideas come across with real punch and have people hanging on your every word. Start using these techniques today and every meeting you attend will definitely go your way.

You don’t have to be highly verbose to promote yourself. Effective listening techniques are more effective, since they strike a chord within all of us that desire to be heard. Show that you are listening, and people will instantly want to agree with your views.

Mirroring techniques
Tune in with a mirror, and get people agreeing with you before you start speaking! Mirroring techniques are a way to get ‘in tune’ with the other party during your discussions. A branch of psychology called Neuro Linguistic Programming (NPL) pioneered this technique, and it’s now widely used in negotiating and sales training. The theory behind mirroring is that we want to align ourselves more closely with the other person. We want them to like us – so that they’ll want to give us what we’re asking for.

Most people would agree that they would tend to go along with suggestions given by like-minded individuals – we just need to persuade some people that they are ‘like minded’! We do this naturally,
in a verbal way. When we meet others for the first time, we try to find something that we have in common. Mirroring is similar except that it uses body language – again, so do you. You can even cross-check if they’re in tune with you by forcing a movement (perhaps folding your arms) to see if they follow!

**One warning:** mirror movements must be subtle, or people may think you are mimicking or insulting them.

**Use the power of silence to win people over.**

Ask any comedian and they’ll tell you that timing is everything. Ask an actor and they will say the same thing about the dramatic pause. Put the two together and you have a very powerful feeling room technique: well-timed silenced. Silence makes people feel uncomfortable. It creates a void that they long to fill, even if with inane chatter. If you are in command of that silence, it can be highly powerful. Practise being silent while staring into a mirror or meeting the gaze of a colleague – it will seem difficult at first, but persevere, it works!

**Positive body movements help you win the race!**

Whenever you are really interested in what others are saying, you will naturally adopt a slightly forward leaning stance. It demonstrates keenness and interest to the other party. The useful thing about this technique is that it can be used to transmit interest in somebody else … even if you are not interested! And this can lead them to reveal valuable information to you. So let your ‘opponent’ keep talking!

**Exploit unique behavioural patterns to read people’s minds.**

Each of us is programmed with our own unique set of movements. You will know the unique mannerisms and behavioural patterns of your own family members. A common behavioural pattern is to touch your face around the nose and mouth when lying. This isn’t true for everyone. As a child, how often did you hear ‘Mom knows you’re lying’? The same applies to adults, but usually we don’t take the time to read and exploit their behavioural patterns. Yet it can be so helpful, because people are great predictors of how people are feeling and how they will react. Next time you are with a colleague or in a meeting situation, make a point of noting any repetitive behavioural patterns – especially when stress levels are high. Practice this technique and you will soon be able to understand what people really think!

**Bottom line**

Whatever you do, before you enter any meeting, think ‘presence’. Enter any meeting feeling small, and I promise you – you will come across as small. Enter feeling large and all-powerful, armed and ready to use these techniques, and that presence will radiate and fill the room, positively influencing everyone in it.
How to deal with Disruptive Individuals at Meetings

Meetings can be ruined by disruptive individuals who seek to dominate proceedings at the expense of others. They frequently interrupt, emotionalise issues, side-track, challenge, complain, engage in repetitious speechmaking, threaten, discount the contributions of others, personalise issues and, in general, throw a pall of gloom over proceedings. Managers must minimise such disruptions and regain control over the meeting. Here are several strategies for handling the disruptive individual.

1. Create a smaller audience for them:
   - Give the disruptive person only one or two people to influence.
   - Break the meeting into smaller groups and instruct each group to generate statements by consensus, prior to reporting back to the full meeting.

2. Get the disruptive person to confront the issue
   - Ignore the content of the individual’s remarks and openly tackle the problem
   - For example, say: “You seem particularly upset or disruptive today, John, especially when someone disagrees with you. Is there any way the rest of us can help you?” Alternatively, gain the support of the rest of the group by becoming a little emotional over the issue, by stating precisely how you feel about the situation. For example, say: “As chair, I feel powerless to accomplish anything at present and I get upset when you try to take over the meeting by attempting to ramrod through your own ideas. John, is there any way we can get this meeting back on to an even keel?”

3. Attack the content
   - Two strategies could be adopted here to force the person to focus on content rather than disruption:
     - Turn the disruptive individual’s questions, pessimistic asides, or veiled threats into statements. This procedure will force him/her to take responsibility for expressing a point of view rather than blocking the proceedings through questions or disparaging comments.
     - Reduce his/her position to absurdity. Adopt an interrogative stance to get to the bottom of the argument being put forward.

4. Pre-plan the meeting to defuse the disruption
   - Various tactics can be used if you know in advance that the disruptive individual will be in attendance:
     - Give the disruptive person a special task or role in the meeting, such as recording the views of others on the whiteboard, or taking the minutes.
     - Structure the meeting to include frequent discussions of progress to date, thereby providing the opportunity for others to highlight the lack of progress due to this person’s on-going obstruction.
     - Remove all vulnerable items from the agenda.
     - Get others on your side before the meeting, by seeking their support in dealing with the anticipated disruption. For example, they can be asked to refuse to argue or to openly confront the disruptive behaviour either verbally or through expressive non-verbal reactions.
• Seek the cooperation of the disruptive individual beforehand. Ask him/her not to argue.
• List disruptive behaviour as an item early on the agenda for discussion.

5. **Suggest a role reversal**
• If the going gets tough during the meeting, try these suggestions:
  • Invite the disruptive individual to argue the other side of the issue for a while.
  • Have the disruptive person summarise proceedings to date.
  • Offer to vacate the chair in favour of the difficult individual.

6. **Listen – just in case**
• Don’t ignore altogether what is being said because the disruptive individual, despite the objectionable approach, may indeed have something useful to contribute to the meeting’s outcome.

7. **Pull the plug**
• When all else fails, and the meeting’s real purposes are being thwarted, drastic measures may be called for:
  • Indicate how the meeting has degenerated, and that the only way out of the chaos is for closure and order. Adjourn the meeting.
  • Leave the meeting, disavowing any responsibility for what has occurred; remembering, of course that follow-through action will be required on your part if you are to retain your authority.

8. **Remain calm and in control**
• All of these strategies demand that the chairperson adopt a cool, unruffled exterior. If you become angry, you give away power. Remember also that, if you use these tactics as part of your routine style, then there is a danger that you could prevent less bold participants from contributing to the meeting for fear of being confronted by you.

**Making Effective and Impactful Presentations**

The central purpose of any presentation, written, oral or visual, is communication. To communicate effectively, you must state your facts in a simple, concise and interesting manner. It is proven that the people learn more readily and retain more information when learning is reinforced by visualisation. You can entertain, inform, excite and even shock an audience by the proper integration of visual images into virtually any exchange of information.

Meetings which might normally be considered dull, or a chore to be avoided, can be transformed into exciting productions that grab the attention of the viewers. This kind of presentation maximizes audience retention of the subject matter. The phrase "a picture is worth a thousand words" has existed since the New York Post discovered the value of visuals in the news business. This remains true to this day.

Simple, clear, concise visual images, briskly paced and sprinkled with attention-grabbing graphics will lend support to your spoken words. This leaves your audience with a positive attitude toward you and your product, service or proposal.
Visuals in business should be used in support of the spoken or written word, and not in lieu of it. A well-developed concept and effective script are the essential elements of any presentation. Regardless of their form, they should be the first and most important phase of its development. When the concept begins to take final form, the visuals are developed around it. This is not to imply that A-V design should be placed near the end of the project. You must begin mentally planning your visuals at the beginning of the design process. Hastily designed and produced visuals can doom a presentation (and a presenter,) where well planned and executed images add tremendous strength.

You can easily communicate concepts that are difficult to grasp through the intelligent use of professionally produced visuals. This allows you the freedom to communicate more complex subject matter in a more efficient manner, adding support and impact to your script.

Finally, your presentation should be entertaining. Leave the audience feeling better and more relaxed when they leave and that impression will carry over to both your subject matter and yourself. There is no logical reason that the presentation of routine sales figures and financial reports should not be as exciting as the unveiling of a new product or a first rate service proposal.

Some specific items to check on your presentation preparation list are:

**Know your subject matter:** While this first point may seem obvious, it is very important that you research every nuance of your subject. Read reports and look up information about the subject with the specific purpose of writing a presentation script. When examined in this light, new ideas and alternative ways of thinking often develop. The ability to present a subject with confidence directly affects your audience’s impressions and will help keep their attention. This is especially important when giving a design presentation or proposal since you are in effect selling your ideas to the audience. This applies whether the audience is a potential client or your own board of directors.

**Know your audience:** A small amount of research into the makeup of your audience will reap large benefits on presentation day. If you were traveling about speaking on behalf of a new construction project you would tailor vastly different presentations to an audience of engineers and a city council. If a small amount of research will help you, imagine what a moderate amount will do!

**Know yourself (and your limits):** We all must push our limits and willingly bite off more than we may be comfortable swallowing on occasion -- this is how we learn and grow. Knowing a few of your limits, however, might avert disaster, or at least embarrassment. Intimately related to Know Your Audience above, your 'limits' are just where you may or may not tread, depending on the makeup of your audience and your relationship with them.

**Develop a theme:** All presentations, regardless of their complexity, are designed with a single purpose. Whether that purpose is to sell, educate, or for pure entertainment, state that purpose to yourself at the beginning of the development process. Keep this purpose in mind always.
Prepare your script: The script does not necessarily have to be a work of literary excellence. For some, simple notes on 3 x 5 file cards are sufficient. Other presenters and presentations require a carefully composed, professionally developed script. The exact form of the script depends on the formality of the presentation, the make-up of the audience and who will be presenting it. Any presentation script, regardless of complexity is like any other business correspondence. It should consist of the same four basic parts, an opening, body, summary and closing.

- The Opening: The opening of the presentation sets the stage for what is to follow. Participants are introduced and the purpose of the presentation is stated. You should also present a VERY BRIEF summary or outline of the points to be covered. This helps keep your audience oriented properly within the framework of your script.

- Body: This is the part of the script in which the bulk of the subject matter is presented. The body of a long presentation should be separated into smaller, easily assimilated modules. Each module or sub-section should make a single point or convey one idea. These sub-sections should each have their own simple opening, body and summary.

- Summary: This portion should be very brief and simple. Here is your chance to reinforce the central theme and purpose of your presentation. Briefly emphasize the key points and main ideas of your script in this section. There is an old axiom that says ... "Tell them what you are going to tell them, tell them, and then tell them what you told them." This pretty well sums it up. Question and answer sessions often follow a final summary and are very productive if managed properly. You should encourage questions from the audience if time or format permits, but be prepared to answer them. If you do not know the correct answer to a question, don't try to fake it. You should refer the question to someone who can answer it correctly or make a note to yourself to obtain the answer later. When you do, contact the person or persons who asked it as soon as possible. This makes an excellent door opener for follow up calls. Old Speaker's Trick: If you don't want any questions, look the audience over and ask if there are any questions. This puts pressure on the audience and makes many of them choke, and therefore, not respond.

- Closing: In a well-structured closing, points raised during the question and answer session (if any) are summarized and any hand-out material that was not required during the presentation is distributed. Hand-out material which emphasizes each key point or idea permits your audience to review the subject and assures that your words will remain fresh in their minds. Hand-out material should not be distributed before a presentation unless it is critical to the theme since it invariably leads to audience distraction.

Select the proper visual aids: With the script developed and the audience research completed, this decision should be simple. A five minute presentation to a three person audience is probably best made with hand-out material alone, or even simple flip charts. Major presentations at annual meetings, trade shows, sales conferences, and presentations to stockholders or client proposals might still dictate an all-out effort with professionally produced special effects, video and all manner of...
glitz and expense. Tablet Computers are becoming popular presentation tools for small groups, informal meetings and remote learning. One of the disadvantages of streaming your presentation to tablets or laptops in the audience is that those attendees tend to develop tunnel vision. Your vocal inflections and body language, both important communications tools, may end up outside of their sensory sphere. Good presentation visuals, regardless of the display medium, do not have to be expensive. When properly planned and produced, simple, well designed graphics add professionalism and impact to virtually any show.

**Prepare a story board:** A story board does not have to be complicated or time consuming to prepare. Its main purpose is to give a general view of the presentation and communicate the important items to the technicians and artists who are creating and assembling the images. You can make your story board using file cards and post-it notes, or opt for a comprehensive colour story board, prepared by professional designers. Changes at the story board level are relatively inexpensive since no images have been produced. During the story board phase you can rehearse the script and easily rearrange, revise, delete from and add to your presentation. When your story board reaches final form it becomes the finished draft for your presentation. This is one of the most important design tools used to produce your graphics. The final story board should consist of a sketch of each individual image, in sufficient detail to convey its approximate finished appearance. If more detailed instructions are needed to create an image than can be clearly conveyed on the story board, individual layout sheets should be prepared. These sheets should specify colours, formats, fonts and values for graphs and charts. If specific artwork or photographs must be used in an image, they should be clearly indicated on the story board or layout sheet for that image.

**Produce the visuals:** If the previous steps have been carefully followed, this can be the easiest part of preparing your presentation. With careful, timely planning, the only task remaining is mechanical process of production. The complete and accurate planning that you have done to this point assures a smooth production cycle without the need for unnecessary last minute changes. This is true whether you use Magic Markers to prepare flip charts on a newsprint pad or require a nine projector slide presentation with live video. Today's computer graphics products permit you to make changes and alterations that could not be accomplished using any other method of production. While last minute changes are possible, avoiding them can still help cut the cost of your presentation by eliminating revision and rush fees.

**Rehearse—rehearse—rehearse:** Your final script and outline or story board permit you to rehearse your presentation even before the visuals are completed. This assures that when your final images are prepared and ready, you will be as well. If you'd like to really test your mettle, drag out the camcorder and tape your rehearsal. Just keep in mind, no one expects you to be Winston Churchill.

**Presentation day:** On the day of the presentation, arrive and set up early. Have spare projector bulbs and extra copies of the hand-out material close at hand. You have your visuals, you are well
rehearsed, the room is set up and the participants are all prepared. Speak clearly and with authority. A little humour if tastefully added can help break the tension of the moment. There should be no surprises. Make certain that the audience questions have been addressed, and of course, thank everyone for attending.

**Follow up:** Check back with the attendants and participants to assure that your presentation goals were met. A questionnaire distributed at the end of your presentation can be a source of critical information for follow up calls or future presentations. Encourage the attendants to call or write with any questions that they did not get answered during the presentation.

**Managing Performance**

Managing team members through "Performance management is the systematic process by which an organisation involves its employees, as individuals and members of a group, in improving organisational effectiveness in the accomplishment of the organisation’s mission and goals." Performance management refers to the continuous process of management by objectives to ensure the attainment of maximum performance towards desired results and therefore improving service delivery." The organisation’s performance management system should be designed to align individual performance objectives with the overall strategic direction of the organisation. This enables synergy between individual and organisational objectives, ensures that at a micro level the organisation is on track, and helps the organisation to evolve in the envisioned strategic direction.

![Figure 9: Performance Cycle](image-url)
Examples of Organisational Performance Standards

**Integrity:** demonstrates personal integrity in the conduct of his or her work

**Teamwork:** works collaboratively with colleagues

**Planning:** wherever possible, plans carefully to anticipate and avoid problems

**Organisation:** manages time well

**Resource use:** seeks and uses human and financial resources wisely

**Cooperation:** is willing to accept reasonable responsibility and help others

**Motivation:** is willing to learn new tasks

**Initiative:** takes active steps to improve the organisation

**Respectful:** instils trust and respect among clients and co-workers

**Punctuality:** respects the value of time for self and others

**Attendance:** is committed to the terms of his or her work agreement

**Level of performance:**

Unacceptable (1): Has failed to meet agreed standards, demonstrated an unsatisfactory level of performance and is not gainfully employed.

Borderline (2): Has failed to exactly meet agreed standards and demonstrated a level of performance that is regarded as on the borderline of unacceptable and acceptable.

Acceptable (3): Has met agreed standards and demonstrated an acceptable level of performance (qualitatively and quantitatively).

Commendable (4): Has in some cases exceeded standards and demonstrated more than an acceptable level of performance (qualitatively and quantitatively), i.e. met the requirements that warrant pay.

Outstanding (5): Consistently exceeded standards and consistently demonstrated exceptional high level of performance (qualitatively and quantitatively).

An individual’s contribution to the team can be measured in terms of their behaviours and how they contribute to the results or performance standards set. Standards at the individual level of performance can be established in the employee’s performance plan or performance contract.

Employees can be appraised on how well they work with team members. Examples of measures used to appraise “team-supportive” behaviour could include the degree to which:

- the employee participates in team meetings,
- the employee volunteers for team projects,
• the employee communicates with members in a constructive and non-threatening manner, and/or the employee
• is perceived by other members as pleasant to work with and cooperative.

It is helpful to prepare in advance just how to frame the feedback, so that the team member feels motivated to redress problem areas and feels affirmed where this is deserved.

Techniques for giving feedback
Performance feedback can be given two ways: through constructive feedback or through praise and criticism. Don't fall into the trap of giving praise and criticism on employee performance. Constructive feedback is information-specific, issue-focused, and based on observations. It comes in two varieties:

• Positive feedback is news or input to an employee about an effort well done.
• Negative feedback is news to an employee about an effort that needs improvement. Negative feedback doesn't mean a terrible performance, but rather a performance in which the outcomes delivered should be better. So negative is not a negative word in this case.
• Praise and criticism are both personal judgments about a performance effort or outcome, with praise being a favourable judgment and criticism, an unfavourable judgment. Information given is general and vague, focused on the person, and based on opinions or feelings.

The guidelines for giving constructive feedback fall into four categories: content, manner, timing, and frequency.

Content
Content is what you say in the constructive feedback.

• In your first sentence, identify the topic or issue that the feedback will be about.
• Provide the specifics of what occurred.

Without the specifics, you only have praise or criticism. Start each key point with an "I" message, such as, "I have noticed," "I have observed," "I have seen," or when the need exists to pass on feedback from others, "I have had reported to me." "I" messages help you be issue-focused and get into the specifics.

Manner
Manner is how you say the constructive feedback. As you may know, how you say something often carries more weight than what you have to say — manner is an important element when giving feedback.
- Be direct when delivering your message. Get to the point and avoid beating around the bush. Both negative and positive feedback should be given in a straightforward manner.

- Avoid “need to” phrases, which send implied messages that something that didn’t go well. For example, “Jane, you need to get your reports turned in on time, and you need to spell check them.” This message is not really performance feedback. It implies that Jane did not do something well with her reports, but it doesn't report exactly what happened. Providing clarity on what occurred is the aim of feedback.

- Be sincere and avoid giving mixed messages. Sincerity says that you mean what you say with care and respect. Mixed messages are referred to as "yes, but" messages. For example, "John, you have worked hard on this project, but." What follows is something the person is not doing well and is the real point of the message. The word "but," along with its cousins "however" and "although," when said in the middle of a thought, create contradictions or mixed messages. In essence, putting "but" in the middle tells the other person, "Don't believe a thing I said before."

- In positive feedback situations, express appreciation. Appreciation alone is praise. Yet when you add it to the specifics of constructive feedback, your message carries an extra oomph of sincerity.

- For example: "Sue, your handling of all the processing work while John did the call-backs made for an efficient effort and showed good teamwork. Everything you did was accurate, as well. Thanks so much for helping out. Such initiative is a real value to the team."

- In negative feedback situations, express concern. A tone of concern communicates a sense of importance and care and provides the appropriate level of sincerity to the message. Tones such as anger, frustration, disappointment, and the ever-popular sarcasm tend to colour the language of the message and turn attempts at negative feedback into criticism. The content of the message gets lost in the noise and harshness.

- The purpose of negative feedback is to create awareness that can lead to correction or improvement in performance. If you can't give negative feedback in a helpful manner, in the language and tone of concern, you defeat its purpose.

- Give the feedback person-to-person, not through messengers of technology. The nature of constructive feedback is verbal and informal. That can be done only by talking live to the employee, either face-to-face or by phone when you physically can't be together.

- State observations, not interpretations. Observations are what you see occur; interpretations are your analysis or opinion of what you see occur. Tell what you've noticed, not what you think of it, and report the behaviour you notice at a concrete level, instead of as a characterization of the behaviour. Observations have a far more factual and non-judgemental aspect than do interpretations.

**Timing**

Timing answers this question: When do you give an employee feedback for a performance effort worth acknowledging? The answer is ASAP (as soon as possible). Feedback is meant to be given in
real-time, as close as possible to when the performance incident occurs so that the events are fresh in everyone’s minds. When feedback is given well after the fact, the value of the constructive feedback is lessened. When giving negative feedback, you may want to apply a different timeline: ASAR (as soon as reasonable/ready — that is, when you’re ready). Sometimes when an incident happens, you aren’t feeling too good about it, and you need time to cool off and get your thoughts in order before you give negative feedback (so that your manner displays a tone of concern). Doing that may mean giving the feedback tomorrow rather than right now, but tomorrow is still timely, and your feedback will come across as far more constructive.

**Frequency**

Frequency answers the question, “How often should your employees receive constructive feedback on their performance?” This last guideline is the most important because it makes all the other guidelines work. Use constructive feedback regularly to acknowledge real performance. Try to catch and respond to employees doing the job right just as much as you catch and respond to them doing something not quite right — and don’t acknowledge how they are performing only once or twice a year. Be sure to keep notes on the performance feedback that you give. It helps you track what's happening in people’s performance rather than relying on your memory.

Performance management is a holistic process of people management in which the primary objective is the establishment of a culture in which individuals and groups take responsibility for the achievement of high levels of organisational performance through enhancement and full utilisation of their own skills, behaviour and contributions. The process ensures that there is a shared understanding of what needs to be achieved at every level in the organisation and provides management with tools for leading and developing staff to achieve the organisation’s goals. Performance management at the organisation is designed to be strategic and integrated into the culture, systems and policies of the organisation In addition it is aimed at being developmental rather than punitive in nature.

Advantages for staff:

- Know and understand what is expected of them
- Have the skills and ability to deliver on these expectations
- Enjoy support from the organisation to develop the capacity to meet these expectations
- Receive feedback on performance
- Be provided with opportunities to discuss and contribute to their own aims as well as those of the team they belong to.

Like many management terms, the words “performance management” have been interpreted, and the concept implemented, in many different ways. A significant proportion of organisations in the cultural sector don’t manage employee performance in a systematic way for a variety of reasons. Organisations should manage employee performance with a continuous feedback system that
focuses on regular, effective communication between managers and staff and minimizes bureaucracy. Ensure that employees’ activities — what they do and how well they do them — are in sync with the goals of your organisation.

Performance management works by specifying company goals and then calculating how the performance of individual employees affects that goal, or contributes to it. Most such studies look at workers in different departments or sections of the company and the overall goal is to ensure that all workers are striving to meet the goal. One way to encourage workers to meet specific goals or targets is to offer rewards or incentives, a strategy that almost always has the desired effect. Any strategy using performance management needs to utilise a long term analysis of the entire organisation, in order to be most effective. This approach can be an effective way to identify and then deal with any performance issues that a company or organisation might have.

Performance management benefits both the individual and the company and it is an approach that analyses employees based on several criteria. These criteria include:

- Problem solving skills
- Ability to streamline processes
- Methods of increasing productivity of workers
- How to reduce the number of complaints

A Performance management system includes the following actions.

- Developing clear job descriptions and employee performance plans which includes the key result areas (KRA) and performance indicators.
- Selection of right set of people by implementing an appropriate selection process.
- Negotiating requirements and performance standards for measuring the outcome and overall productivity against the predefined benchmarks.
- Providing continuous coaching and feedback during the period of delivery of performance.
- Identifying the training and development needs by measuring the outcomes achieved against the set standards and implementing effective development programs for improvement.
- Holding quarterly performance development discussions and evaluating employee performance on the basis of performance plans.
- Designing effective compensation and reward systems for recognizing those employees who excel in their jobs by achieving the set standards in accordance with the performance plans or rather exceed the performance benchmarks.
- Providing promotional/career development support and guidance to the employees.
- Performing exit interviews for understanding the cause of employee discontentment and thereafter exit from an organisation.

A performance management process sets the platform for rewarding excellence by aligning individual employee accomplishments with the organisation’s mission and objectives and making the employee
and the organisation understand the importance of a specific job in realizing outcomes. By establishing clear performance expectations which includes results, actions and behaviours, it helps the employees in understanding what exactly is expected out of their jobs and setting of standards help in eliminating those jobs which are of no use any longer. Through regular feedback and coaching, it provides an advantage of diagnosing the problems at an early stage and taking corrective actions.

To conclude, performance management can be regarded as a proactive system of managing employee performance for driving the individuals and the organisations towards desired performance and results. It’s about striking a harmonious alignment between individual and organisational objectives for accomplishment of excellence in performance.

**Performance management and discipline**

Discipline is a learning process. The specific ways in which a manager applies the disciplinary steps is dictated by:

- the law
- the company policies
- maybe by Union agreements

A manager must be familiar with all applicable policies and rules. These should include respecting the rights of employees in the discipline process.

Employee’s generic rights include the following:

- The right to know job expectations and the consequences of not fulfilling those expectations.
- The right to receive consistent and predictable management action in response to violations of the rules.
- The right to receive fair discipline based on facts.
- The right to question management’s statement of the facts and to present a defence.
- The right to receive progressive discipline.
- The right to appeal to a disciplinary action.

Before administering discipline in response to problem behaviour, managers need to have a clear picture of the situation; they need to collect all facts before taking action. Also get the employee’s version of the problem. Use good listening and resist the temptation to get angry.

**Guidelines for disciplining**

- Act immediately (Ignoring the problem results in giving the signal that the problem is not serious)
- Focus on learning about and resolving the issue at hand. (Talk about the behaviour and the consequences of that behaviour, not the employee)
• Keep emotions in check (Convey your sincere concern about the problem, but other feelings are irrelevant. They usually block the flow of discussion)
• Administer discipline in private
• Be consistent (Respond to all instances of misbehaviour)

Distinguish between discipline and punishment

**Punishment** is an unpleasant consequence given in response to undesirable behaviour. Wherever possible the manager should choose the discipline approach. **Discipline** is action taken by the manager to prevent employees from breaking the rules. The manager explains the significance and consequences of the employee’s behaviour, and only then, if necessary, lets the employee experience the consequences. Discipline is broader than punishment and is part of a guidance and teaching process. Well administered discipline, leads to improved performance of the employee. Know the correct disciplinary procedures in your organisation and follow the procedure to the last dot.

**Appraisal skills – dealing with poor performance**

Are individual members of your team performing less well than you'd hoped? To figure out what's causing the performance issue, you have to get to the root of the problem. But because employee performance affects organisational performance, we tend to want to look for a quick fix. Would a training course help Ted? Or should you move him into a different role? These types of solutions focus largely on the ability of the person performing the job. Performance, though, is a function of both ability and motivation.

**Performance = Ability x Motivation**

Where:

Ability is the person’s aptitude, as well as the training and resources supplied by the organisation

Motivation is the product of desire and commitment

Someone with 100% motivation and 75% ability can often achieve above-average performance. But a worker with only 25% ability won’t be able to achieve the type of performance you expect, regardless of his or her level of motivation. So, before you can fix poor performance, you have to understand its cause. Does it come from lack of ability or low motivation?

Incorrect diagnoses can lead to lots of problems later on. If you believe an employee is not making enough of an effort, you'll likely put increased pressure on him or her to perform. But if the real issue is ability, then increased pressure may only make the problem worse.

Low ability may be associated with the following:

• Over-difficult tasks.
• Low individual aptitude, skill, and knowledge.
• Evidence of strong effort, despite poor performance.
• Lack of improvement over time.

People with low ability may have been poorly matched with jobs in the first place. They may have been promoted to a position that's too demanding for them. Or maybe they no longer have the support that previously helped them to perform well.

Enhancing Ability
There are five main ways to overcome performance problems associated with a lack of ability. Consider using them in this sequence, which starts with the least intrusive:

• Resupply.
• Retrain.
• Refit.
• Reassign.
• Release.

Be sure to address each of these interventions in one-on-one performance interviews with employees.

1. Resupply – Focus on the resources provided to do the job. Do employees have what they need to perform well and meet expectations? Ask them about additional resources they think they need. Listen for points of frustration. Note where employees report that support is inadequate. Verify the claims with your own investigation. People will often blame external sources for their poor performance before admitting their own fault. This is a very effective first step in addressing performance. It signals to members of your team that you're interested in their perspective and are willing to make the required changes.

2. Retrain – Provide additional training to team members. Explore with them whether they have the actual skills required to do what's expected. Given the pace of change of technology, it's easy for people's skills to become obsolete. This option recognizes the need to retain employees and keep their skills current. There are various types of retraining you can provide: Training seminars with in-house or external providers. Computer-based training (CBT). Simulation exercises. Resupplying and retraining will often cure poor performance. People and organisations may get into ruts, and fail to recognize these issues until poor performance finally highlights them.

3. Refit – When these first two measures aren't sufficient, consider refitting the job to the person. Are there parts of the job that can be reassigned? Analyse the individual components of the work, and try out different combinations of tasks and abilities. This may involve rearranging the jobs of other people as well. Your goal is to retain the employee, meet operational needs, and provide meaningful and rewarding work to everyone involved.
4. Reassign – When revising or refitting the job doesn't turn the situation around, look at reassigning the poor performer. Typical job reassignments may decrease the demands of the role by reducing the need for the following: Responsibility, technical knowledge, interpersonal skills. If you use this option, make sure the reassigned job is still challenging and stimulating. To ensure that this strategy is successful, never use demotion as a punishment tactic within your organisation. Remember, the employee's performance is not intentionally poor – he or she simply lacked the skills for the position.

5. Release – As a final option for lack of ability, you may need to let the employee go. Sometimes there are no opportunities for reassignment, and refitting isn't appropriate for the organisation. In these cases, the best solution for everyone involved is for the employee to find other work. You may need to consider contractual terms and restrictions; however, in the long run, this may be the best decision for your whole team. Remember, there are potential negative consequences of retaining a poor performer after you've exhausted all the options available: You'll annoy other members of your team, who may have to work harder to "carry" the poor performer. You may promote a belief in others that you're prepared to accept mediocrity – or, worse, underperformance. You may waste precious time and resources that could be better used elsewhere. You may signal that some employees deserve preferential treatment. You may undermine the whole idea of finding the best person for the job.

Improving Motivation

Sometimes poor performance has its roots in low motivation. When this is the case, you need to work closely with the employee to create a motivating environment in which to work.

There are three key interventions that may improve people's motivation:

- Setting of performance goals.
- Provision of performance assistance.
- Provision of performance feedback.

1. Performance Goals – Goal setting is a well-recognized aspect of performance improvement. Employees must understand what's expected of them and agree on what they need to do to improve.

2. Performance Assistance – Once you've set appropriate goals, help your team member succeed by doing the following:

- Regularly assessing the employee's ability, and take action if it's deficient.
- Providing the necessary training.
- Securing the resources needed.
- Encouraging cooperation and assistance from co-workers.

3. Performance Feedback – People need feedback on their efforts. They have to know where they stand in terms of current performance and long-term expectations.

When providing feedback, keep in mind the importance of the following:
• **Timeliness** – Provide feedback as soon as possible. This links the behaviour with the evaluation.

• **Openness and Honesty** – Make sure the feedback is accurate. Avoid mixed messages or talking about the person rather than the performance. That said, provide both positive and negative feedback so that employees can begin to truly understand their strengths and weaknesses.

• **Personalized Rewards** – A large part of feedback involves rewards and recognition. Make sure that your company has a system that acknowledges the successes of employees.

Supporting this, ensure that you meet regularly with the employee, so that you can review progress and provide regular feedback.

**Creating a Performance Improvement Plan**

So how do you do this in practice? This is where you need to develop a Performance Improvement Plan. Armed with the strategies we’ve looked at, you first need to evaluate the performance issue that you’re facing:

• Have you discussed with the person what he or she feels the problem is?

• Have you evaluated your organisation’s motivation system? Are you doing everything you can to recognize and reward people’s contributions?

• Are you rewarding the things that you actually want done?

• Do you have regular goal setting and development meetings with members of your team?

• Do you help your people keep their skills current?

From there, it’s important that you and the employee discuss and agree upon a plan for improving performance. Write down what you’ve agreed, along with dates by which goals should be achieved. Then monitor progress with the team member, and use the techniques we’ve discussed above for increasing motivation and dealing with ability-related issues. Recognize that the actions needed to close ability gaps need high motivation on the employee’s part to be successful. The two causes of poor performance – lack of ability and low motivation – are inextricably intertwined, and goal setting, feedback, and a supportive work environment are necessary conditions for improving both.

You need to understand the root of a performance problem before you can fully address it. Ability and motivation go together to impact performance, and the most successful performance improvement efforts combine strategies for improving each. This creates a positive environment where people feel supported to reach their performance potential; and feel valued, knowing that the organisation wants to find a good fit for their abilities.

At times, your interventions may not be enough to salvage the situation. As long as you’ve given performance enhancement your best effort, and you’ve reasonably exhausted all your options, then you can feel confident that you’re making the right decision if you do need to let someone go.
Before going down that route, however, try the strategies discussed here and create a great work environment for your employees – one where their abilities are used to their full potential, and where good motivational techniques are used on a regular basis.

**Giving Effective Feedback**

One area consistently gives both managers and employees difficulty – the need to give and accept effective feedback. The problem is that giving effective feedback is one of the most crucial elements you can do help employees improve performance. It establishes a connection between what employees are doing and how actions are perceived by others. Although most would rather have an abscessed tooth than receive feedback, there is a need to gently convey that no feedback can be much worse.

Giving feedback is not about dishing out criticism. Unfortunately, this often proves to be the case when managers find themselves under pressure. It is at these times that emotions get in the way of effective management. Under stress, all carrots harden into sticks which the manager uses to whip their employees into shape.

Let's turn the story around. As a manager, you want to be liked by your employees. You have always resented those who misjudge you and who find fault without knowing the full story. You vowed that when you became a manager that you would not follow this course of action because you know this type of behaviour does nothing to improve your performance but rather makes you mistrust people and devalue their capabilities.

So how do you give effective feedback that makes employees want to do their best possible job? Unfortunately, there are a few problems in the way. The first one being that you likely are – or want to be – a high achiever. Because you want to get results now, you feel like you have to move right into problem solving by directing staff to fix a problem in a specific way. The problem is that this quick fix solution shouts, loudly, “Inexperienced manager!”

In contrast, effective manager begin the feedback process by listening to their people. They realize they can’t effectively communicate their goals and needs until they first listen to learn. As a result, the effective manager encourages input into the situation in order to determine what may be interfering with getting the job done in the most effective way. What you want to do is learn what options the employee has considered. Once you’ve gained a broader perspective of the situation, then you can make appropriate suggestions or recommendations.

Effective communication is required for effective feedback. It's also an essential quality of a good leader, along with trust, competence, and showing respect.
Whether you are giving formal or informal feedback, there are a number of basic principles to keep in mind.

- Give feedback only when asked to do so or when your offer is accepted.
- Give feedback as soon after the event as possible.
- Focus on the positive.
- Feedback needs to be given privately wherever possible, especially more negative feedback.
- Feedback needs to be part of the overall communication process and ‘developmental dialogue’. Use skills such as rapport or mirroring, developing respect and trust with the learner.
- Stay in the ‘here and now’, don’t bring up old concerns or previous mistakes, unless this is to highlight a pattern of behaviours.
- Focus on behaviours that can be changed, not personality traits.
- Talk about and describe specific behaviours, giving examples where possible and do not evaluate or assume motives.
- Use ‘I’ and give your experience of the behaviour (‘when you said…, I thought that you were…’).
- When giving negative feedback, suggest alternative behaviours.
- Feedback is for the recipient, not the giver – be sensitive to the impact of your message.
- Consider the content of the message, the process of giving feedback and the congruence between your verbal and non-verbal messages.
- Encourage reflection. This will involve posing open questions such as:
  (a) Did it go as planned? If not why not?
  (b) If you were doing it again what would you do the same next time and what would you do differently? Why?
  (c) How did you feel during the session? How would you feel about doing it again?
  (d) How do you think the patient felt? What makes you think that?
  (e) What did you learn from this session?
- Be clear about what you are giving feedback on and link this to the learner’s overall professional development and/or intended programme outcomes.
- Do not overload – identify two or three key messages that you summarise at the end.

Emphasising that responding to the senders’ communication is vital and that feedback is fundamental to effective communication. ‘Communication is a two-way process that leads to appropriate action… in the context of developing competence, it is not an exaggeration to describe feedback as “the fuel that drives improved performance”.’

**Stretching your Team to Develop**

Much has been written about motivation, and, as leaders, it is important to understand what motivates employees. Why do people do what they do? Three factors have been identified as playing a very important role in those decisions. They are (1) feelings, (2) values, and (3) needs.
Feelings
Feelings or emotions can lead to positive or negative behaviour. Generally, positive feelings lead to positive behaviours and negative ones tend to sabotage the work environment.

Values
When talking about values we are referring to the importance we give to things. Values include honesty, fairness, loyalty, dignity, professionalism, etc. and their influence in an employee's priorities. Realistically, not all employees will share the same set of values, therefore it is a good idea to implement certain company values and encourage all employees to respect them.

Needs
We talked more about the need hierarchy theory earlier in this report. Mainly, in order for a reinforcer to be effective and for motivation occur, the system has to fulfil not only the employees’ basic needs but the more complex ones too.

What can be done to motivate the employee? This is one of the most crucial questions facing managers in all organisations today. When used consistently and correctly, motivational techniques can help to turn a department or company with a slumping morale and productivity into a galvanized unit of dragon slayers.

Whatever views a manager holds of motivation, and whichever motivational theory is put into practice, communication is the key to impart commitment and enthusiasm to any organisation. Motivational theory has changed a lot over the past decade and much has been written about it. We however will discuss only 2 motivational theories:
- The Maslow motivational theory
- The Herzberg motivational theory

Maslow's Need Hierarchy Theory
In 1954, Maslow first published *Motivation and Personality*, which introduced his theory about how people satisfy various personal needs in the context of their work. He argued, based on his observations as a humanistic psychologist, that there is a general pattern of needs recognition and satisfaction that people follow in generally the same sequence. He also theorized that a person could not recognize or pursue the next higher need in the hierarchy until her or his currently recognized need was substantially or completely satisfied, a concept called *prepotency*. Maslow's hierarchy of needs is shown below. It is often illustrated as a pyramid with the survival need at the broad-based bottom and the self-actualization need at the narrow top. At the bottom are basic physiological needs (food, shelter, and clothing).
Following that is safety. For instance, employees need to be assured that the company cares about their safety. A more broad definition of safety goes beyond the physical aspect of it. It includes variables such as discrimination, favouritism, stereotyping, etc.). The next level of needs would be the social level. At this level the human need for love and a sense of belonging would be addressed. When designing Teams, this level should be carefully considered. The fourth level is self-esteem. This need is met when respect among co-workers, management, team members and all different levels of the company structure exist. The last but not least important level of need is self-actualization. According to Maslow, this is the highest and most complex level. It relates to people's need to reach their full potential.

### Table 3: Examples of Need Hierarchy

<table>
<thead>
<tr>
<th>Level</th>
<th>Type of Need</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Physiological</td>
<td>Thirst, sex, hunger</td>
</tr>
<tr>
<td>2</td>
<td>Safety</td>
<td>Security, stability, protection</td>
</tr>
<tr>
<td>3</td>
<td>Love and Belongingness</td>
<td>To escape loneliness, love and be loved, and gain a sense of belonging</td>
</tr>
<tr>
<td>4</td>
<td>Esteem</td>
<td>Self-respect, the respect others</td>
</tr>
<tr>
<td>5</td>
<td>Self-actualization</td>
<td>To fulfil one's potentialities</td>
</tr>
</tbody>
</table>
Herzberg’s Motivational Maintenance Theory

The Motivational Maintenance Theory was developed by Herzberg. The process of development of this theory consisted of interviews with more than 200 engineers and accountants. The interviewees were asked to recall incidents at work that they associated with experiencing high or low self-esteem. Results of these interviews indicated that positive feelings were often associated with achievement, recognition, etc., and negative feelings with the work environment such as company policies, relationships with co-workers and supervisors, job security, working conditions, etc. Herzberg constructed a two-dimensional paradigm of factors affecting people’s attitudes about work. He concluded that such factors as company policy, supervision, interpersonal relations, working conditions, and salary are hygiene factors rather than motivators. According to the theory, the absence of hygiene factors can create job dissatisfaction, but their presence does not motivate or create satisfaction. In contrast, he determined from the data that the motivators were elements that enriched a person’s job and he found five factors in particular that were strong determiners of job satisfaction:

- achievement,
- recognition,
- the work itself,
- responsibility, and
- advancement.

These motivators (satisfiers) were associated with long-term positive effects in job performance while the hygiene factors (dissatisfiers) consistently produced only short-term changes in job attitudes and performance, which quickly fell back to its previous level. In summary, satisfiers describe a person’s relationship with what she or he does, and many of these satisfiers are related to the tasks being performed. Dissatisfiers, on the other hand, have to do with a person’s relationship to the context or environment in which she or he performs the job. The satisfiers relate to what a person does while the dissatisfiers relate to the situation in which the person does what he or she does.

Why do people work?

At first, it was thought that people worked to earn money. To a certain extent this was true. But, although people do expect to get paid, do enjoy the things money can buy, and would like to make more money; they don’t work for only the money. Primarily, people do what they do to satisfy certain needs or to get satisfaction. Most employees have other needs, apart from worker benefits, that can and should be satisfied in the workplace. In fact, these needs must be fulfilled before the employee is truly motivated. The fact is that all people like to have their egos boosted. They like to think that they are useful. They would like to contribute something for which they will get the credit. This ego need comes to the forefront time and again in all employees and is a need that managers can use for effective motivation in the workplace.
People are unique resources and an organisation's most important asset. They have different backgrounds and experiences, different needs and desires. Managers have to coordinate the efforts of all employees toward organisational goals. Before people can make an effort to achieve a goal, they must want to behave in a way that will accomplish organisational goals and provide fulfilment to the individual. The primary goal should be to build and maintain a highly motivated workforce.

Individual symptoms of inadequate motivation are easy to identify:

- Apathy, boredom, inattention, lack of concentration, intentional resistance, waste, sabotage, errors, time wasting, and resistance to change are but a few.
- Other signs are tardiness, absenteeism, excessive sick leave, and conflict, tendency to leave the workstation, withholding resources, and lack of commitment to the organisational goals.
- In addition to individual symptoms, organisational symptoms of inadequate motivation can be identified. Generally low morale, high waste costs, overall attendance problems, high personnel turnover, high training costs showing little results, and adverse management / labour relations, are all indicative of inadequate motivation and a poor organisational climate.

Guidelines for Stretching your team to develop them further:

The desire to stretch employees must be an integral part of the organisation's corporate culture. Superior companies and effective managers use a variety of techniques to motivate employees and to achieve their organisational goals. Some of the successful strategies employed by such organisations will be discussed.

Select the best

Since the source of motivation is within the individual, outstanding organisations only employ people who have the potential to be motivated in the first place. Selection of candidates is based on more than credentials or the required skills. They look for a solid system of values consistent with those of the company. All organisations claim to employ superior candidates, but few actually exhibit the courage to demand – and get – the best. Substantial time and effort must be dedicated to identifying new talent. The interview is the essential communication tool, and should be thorough and assess personality, behaviour and management styles. It is essential to identify the candidate’s work ethic values and to convey those of the company to the candidate: discipline, desire, commitment to self-development, a willingness to work hard, enthusiasm, and a goal / results orientation.

Create a vision and align people to it

One of the primary ingredients for motivating people is to create a powerful vision - a clear sense of where the organisation, or part of the organisation, is going and how it is going to get there. The organisation’s vision should become a catalytic force, the underlying principle for everything the people in the organisation do. Usually the source of a vision is a person who possesses a unique combination of skills: the mental power to create a vision and the practical ability to bring it about. However, intellectual strategies alone will not motivate employees who can help to realize the vision.
by adopting it as their own and by sharing responsibility for achieving it. This critical process is called alignment. When people work to their full capacity, when they feel in synchrony with their colleagues, when everything comes together because of the collective commitment and contribution of all group members, alignment is present.

**Determine which rewards are valued and important to each employee**

One has to realize that different things motivate different people. Although some people are excited by monetary rewards, many other rewards go a long way toward making employees feel valued and acknowledged for their contributions. To some people, written documentation of individual success is important. To others, verbal recognition offers more encouragement. Some people need reinforcement more than others. Because of these different motivational factors, managers should determine the most powerful reward for each employee.

**Empower and consult employees**

One of the recent ‘miracles’ of business is the turnaround of the Ford Motor Co. How did it happen? Ford put into practice something fundamental to motivation, empowering employees. Ford went directly to the people who were responsible for the company’s product: its employees. They surveyed assembly line workers, mechanics, dealers, sales representatives, and satisfied customers – anyone who had ‘stock’ in the company (as opposed to those who owned stock but looked only at the bottom line). The combined input from all of these formerly fragmented pools of expertise contributed to a winning team. Empowering employees does not mean trading organisational structures for chaos, but just the opposite. When people feel that they are important and that their contribution is meaningful, they work more effectively and contentedly in any capacity. Managers have to be careful not to ‘manage’ employees more than necessary. Taking frequent walks through a group’s area, enquiring several times a day about the status of various projects and getting involved with minor details that should be handled by staff are signs of an overly attentive style that can inhibit productivity by creating an impression that the manager does not trust employees to do their work correctly. Such behaviour has to be modified and employees have to be given more autonomy and empowerment.

**Provide opportunities beyond traditional roles**

The number of opportunities for promotions within companies has dropped dramatically in recent years. Slower economic growth, mergers and acquisitions and flatter, leaner organisations are mainly responsible for this trend. Many organisations have learned that they must provide opportunities beyond traditional job functions. Involvement in task force, study teams and special projects can help to foster a broadened job scope. In some instances, rotating employees through different functions within cause resistance. The fact is that a broader job scope is possible on all employee levels.

**Enhance career development**

Good companies recognize that their best employees – in fact, most employees – want to improve themselves. Unfortunately, employee career development is a two-edged sword. Many ‘job-hoppers’ will stay in a company long enough to improve their skills, before they are off to greener pastures. The only way to combat this loss of the most productive employees in search of career development is to provide growth opportunities. Employees cannot maintain or increase same job, preserving the status quo, indefinitely. Quality invariably suffers.
Recognise contributions
A pay rise alone does not have sufficient power to motivate in the long term. The best way to motivate employees is to raise their professional and personal self-esteem. A manager who adopts a policy of recognizing employees’ outstanding contributions at staff meetings can praise employees for their accomplishments publicly. Those employees will respond by striving to achieve something important each week. It is a fact of human nature that people will spare no effort to earn the accolades of an individual or group that they are certain truly appreciates their work.

Provide incentives and rewards
This does not mean that incentives and rewards do not play an important role in motivation. But it is essential to remember that the primary motivating factor provided by rewards is the psychological effect on the individual, not the material value of the reward. Employees are motivated more by the boost in self-esteem that comes with public recognition than by monetary compensation. Nevertheless, when held out as a carrot, monetary incentives do motivate in the short term. However, once gained, they lose all their motivating power.

An organisation’s incentive and reward system is not only important to the individual employee’s performance, but also contributes to the overall morale and climate in an organisation. Since the value of any reward or recognition lies in its effect on the employee and on his or her peers, decisions about rewards should not come out of a mysterious black hat in the president’s office. An employee who fails to get along with colleagues should not be indiscriminately promoted, no one who is recognized as a ‘coaster’ should share the fruits of those who do labour. An inappropriate raise or other reward can have devastating effects on the entire organisation: employees have to feel that fairness, equity and trust are at the very heart of their relationship with their organisation and its managers.

Decision Making and Delegation Skills
Giving Orders/instructions – involves telling an employee in your team WHAT, HOW and by WHEN to accomplish a specific task. As the manager you are accountable and you hold on to all authority and responsibility for the job. As a result, unless you are standing next to the person, you seldom get the exact outcome as you expected.

Delegating – involves telling an employee in your team WHAT NEEDS to be achieved and BY WHEN. However, you do not specifically define HOW TO DO IT. You also give the employee a certain amount of authority and responsibility. Although you can hold the employee accountable for the specific task delegated, as a manager you remain accountable for the task being done to the required standards.

Just a quick reminder: Responsibility, authority and accountability
Responsibility: The obligation to perform assigned activities. If a person is given the responsibility to carry out a job, he should be given the authority to obtain the materials, equipment, help from others, or anything else needed to complete the job.

Authority: The right to perform a task or give orders to someone else. When accepting or delegating responsibility, it is important to clearly understand or explain the responsibility and the authority, to complete the task to the best of one’s ability.

Empowerment: Delegation of decision making authority and responsibility. Empowerment is based on the expectation that employees will provide more insight and expertise than managers could provide alone, and to make employees more committed to what they have to do.

Accountability: Although supervisors can hold employees accountable for the assignments they delegated to them, supervisors ultimately remain accountable for the employees’ performance.

Pitfalls in delegation

DO NOT

- delegate at random
- delegate only the unpleasant jobs
- delegate without giving enough information
- delegate too much for a person to handle
- delegate responsibility without authority
- delegate, and then want things done your way
- delegate without a periodic review

Benefits of delegation

- To the organisation
  - improved morale of employees
  - creates a pool of people who can be promoted to supervisory /manager level
  - often better decisions, as an opportunity is created for different solutions to be tried out
  - may decrease staff turnover
- To the manager (who delegates)
  - creates time to concentrate on main job aspects
  - easier to manage
  - enhanced performance of employees through increased job satisfaction and a general feeling of being important
- To the employee (who is delegated to)
  - improved motivation
  - enhanced self-image
  - improved job satisfaction
Five essential steps for delegation:

**Step 1:** Explain WHY the job is important and WHAT the expected outcome of the task is. Delegate in terms of the results to be achieved.

**Step 2:** Define the authority of the person you are delegating to. Authorities may include people to help, access to equipment, access to confidential information, a budget, authorisation of overtime, etc. Communicate clearly on what authority you delegate.

**Step 3:** Agree on a deadline. Set a clear deadline for finishing off the task and explain the importance of the task being finalised on or before the date or time.

**Step 4:** Ask for feedback. Let the employee explain in his own words what you have told him concerning WHAT to do, what AUTHORITY he has and by WHEN the task should be completed. Examples of how this could be done:

- "John, just to make sure I've explained this in full, why don't you tell me what I am expecting from you."
- "Simone, for peace of mind on my side that you have fully understood, please tell me what I have asked you to do."
- "Let us recap Frank, tell me."
  - WHY is this task important? – (wait for answer)
  - WHAT is the outcome I expect? – (wait for answer)
  - WHAT authority did I give you? – (wait for answer)
  - WHEN should the task be finished? – (wait for answer)

Using this step four technique, ensures that the employee has fully understood your instruction and cannot turn around afterwards saying he/she misunderstood what you wanted.

**Step 5:** Monitor the progress and provide for controls – Do not wait with checking how the employee is doing until the deadline time. Depending on the size and length of the task, set a few checkpoints with the employee before he/she starts the job.

Examples:

- If the task will take a full week set up two, three or daily specific times at which the employee knows you will be checking with him/her.
- If the task is a few hours, set up a time after about one hour to check with him/her.
Through the use of this step five technique, you avoid creating the impression that you are interfering with the delegated task, but at the same time you can establish whether the employee is on track with the job.

- **Tips**
  - When you delegate, you maintain the ultimate responsibility for the task, even though others complete the job.
  - It will take effort to delegate as it involves teaching the other person how to perform the job and checking that it is being completed to the required standards.
  - Delegating work helps to develop the skills of other employees.
  - When delegating a task, set a goal that is a challenge but not totally beyond reach

**Decision making**

Much of what managers and supervisors do is solve problems and make decisions. New managers and supervisors, in particular, often make solve problems and decisions by reacting to them. They are "under the gun", stressed and very short for time. Consequently, when they encounter a new problem or decision they must make, they react with a decision that seemed to work before. It's easy with this approach to get stuck in a circle of solving the same problem over and over again. Therefore, as a new manager or supervisor, get used to an organised approach to problem solving and decision making.

Not all problems can be solved and decisions made by the following, rather rational approach. However, the following basic guidelines will get you started. Don't be intimidated by the length of the list of guidelines. After you've practiced them a few times, they'll become second nature to you -- enough that you can deepen and enrich them to suit your own needs and nature.
SECTION 4: CREATING HIGH PERFORMANCE TEAMS

Teamwork in Action

The concept of teamwork is extremely important to the success of any team. All coaches talk about working as one unit, as a unified team. Teamwork and unselfishness create the backbone of a great team, without them a team cannot realistically compete. You can have a group of superstars, but if they do not work well as one unit, chances are they are not going to be as successful as you would think. The team working as one cohesive unit is going to be the key in their success.

Here are some things to take into consideration when you are looking at your team:

- Does your team have agreed-upon goals they created as a team?
- Do the players openly encourage and support one another?
- Do they have open communication with one another, as well as the coaching staff?
- Does each player know what their role on the team is?
- Is there mutual respect among the players and coaching staff?
- Do players use statements such as "we" when referring to the team, or is it more of an "every man for himself" mentality?
- Have they created a positive team image for themselves?
- Are the individual contributions of each player recognised (regardless of whether he/she is a starter or not a starter)?
- Is the team as a whole committed to improving performance?
- Does each member consider themselves as a "team player?"

A productive team has players that share common goals, a common vision and have some level of interdependence that requires both verbal and physical interaction. Teams come into existence through shared attitudes about a particular sport. They may come together for a number of different reasons, but their goals are the same - to achieve peak performance and experience success. The ends may differ but the means by which one gets there is the same - teamwork. Every member of the team is accountable when it comes to teamwork.

To succeed at the task in hand everyone involved needs to combine their efforts. If everyone does their job well, then it increases what the team can accomplish. This teamwork has to be recognised by everyone and know that great things can happen if individuals master the fundamentals and work together as one unit. Everyone has their own unique role, but each person's individual role must be recognised and appreciated.

Teamwork is something that must be a high priority and given constant attention. Every player needs to understand how important it is for them to work smoothly together if they want to be successful.
Each player must be dedicated to the whole team and be willing to act unselfishly. When challenges arise (as they always do), the team needs to have the resources, accountability and commitment to deal with them in a constructive and positive manner. A sense of teamwork will play an integral part in this.

Just remember **T.E.A.M. - Together Everyone Achieves More!**

**Team Learning and Performance**

Team learning focuses on the abilities of a group working together. It involves the interaction of people learning from each other as well as from the task at hand. The learning takes place through the transfer of skills by observing others in action, collective problem-solving and experimentation, questioning assumptions and reviewing outcomes as a group.

**Team Learning helps to:**

- Share prior skills, knowledge and experience enhancing the learning experience for the team.
- Force participants to present, promote and negotiate their views leading to better retention.
- Develop open, effective communications within the organisation as individuals learn the value of sharing info with colleagues.
- Create co-operative working practices and build better links within organisations.
- Reveal new insight about colleagues
- Build trust and create a supportive environment allowing participants the confidence to explore beyond their perceived limitations.
- Generate competition between teams, which motivates individuals to work harder and learn more.
- Allow team members direct the learning within the group making the training more enjoyable, relevant and effective.

**Making the Most of Team Learning**

1. Mix normal work teams up. Establish cross-departmental teams or those made up or employees from all levels of the organisation. The more skills and experiences individuals can bring to the group, the more effective the learning will be.
2. Make the environment as informal as possible. Using only first names and changing out of normal workplace clothes can remove work place hierarchy. This will give participants more confidence in offering their own opinions. If practical, hold the activity away from the workplace to a neutral location.
3. Rotate leadership in the teams. This allows everyone in the team a chance to have his or hearsay. Quieter, less assertive member may feel over shadowed otherwise.
4. Ask each team to make notes to capture the learning generated through the activity. These can then be shared with all the participants after the event.
5. Whatever the activity, be it bridge building or orienteering, set specific tasks so the team has a goal to work towards and their success can be measured. This will help install a sense of achievement.

6. Keep the learning going. After a set time ask participants to share how their working lives have changed following the activity and what they’d still like to improve on. Follow up with more team learning on a regular basis looking at the areas identified from participants.

One of the key elements of team learning is a willingness to deeply explore a problem. We can develop this skill individually using personal mastery, but something unique happens when we bring our willingness to explore a problem into a group situation. According to Senge, a group's collective IQ is much higher than the IQ in an individual if the group can coalesce and begin to use each other as a springboard for understanding and resolving the problem at hand. We’ve all been in meetings where everyone is engaged and excited, and the ideas just seem to build seamlessly on one another. When this happens, the solution the group has developed is above and beyond the work that any team member could have done individually.

As aids to helping teams think through complex problems, here is a list of challenging assumptions:

- Today's problems come from yesterday's "solutions."
- The harder you push, the harder the system pushes back.
- Behaviour grows better before it grows worse.
- The easy way out usually leads back in.
- The cure can be worse than the disease.
- Faster is slower.
- Cause and effect are not closely related in time and space.
- Small changes can produce big results—but the areas of highest leverage are often the least obvious.
Team Evolution Stages
Any team goes through various stages of working together – these are known as:

**Figure 11: Team Evolution Stages**

These four phases are explained below in more detail:

**Phase 1: Forming**
In the Forming stage, team members are getting to know one another and getting comfortable with one another. Members will naturally try to understand their own roles, the roles of the other team members and their purpose in the group. This is entirely natural and to be expected. People are unsure, suspicious and nervous.

**Characteristics of Forming**
Look for the following behaviours in the Forming stage:
- Members trying to define the task.
- Lofty, conceptual discussions as people try to express who they are.
- Discussions about what information needs to be gathered.

**How to Address the Forming Stage**
Help team members get to know one another. Make sure the purpose and task are clearly defined and share management expectations of the group. Give the team time to get comfortable with one another, but move the team along as well.
Phase 2: Storming

Once the team works together for a while, they will leave the Forming stage and enter Storming. Politeness begins to wear off and dissension occurs over basic mission and operating procedures. Control often becomes the primary issue. Who is going to decide what? Disagreements can be either very obvious or subtle. Storming is the most difficult stage for a team to weather, but it is necessary for healthy team development. When team members begin to trust one another enough to air differences, this signals readiness to work things out.

Characteristics of Storming

Look for the following behaviours in the storming stage:

- Members begin to show their true styles.
- A growing impatience will surface over lack of progress.
- Members will get into one another’s territory, causing irritation.
- General disagreement over process, task and overall purpose of the team.

How to Address the Storming Stage

Don't ignore the Storming stage. Acknowledge it with the team as a natural developmental step. Facilitators should surface the conflicts and address them. This is a good time to review ground rules, revisit the purpose and related administrative matters of the team.

Phase 3: Norming - Charting a Course

When teams recognize their differences and have dealt with them, they move to Norming, the stage when they ask, "How are we going to accomplish our work?" Beyond the politeness and nervousness of Forming and past the issues and concerns of Storming, teams will want to review how they are functioning. As team members learn to work out their differences and emotional conflicts are reduced, they will have more time and energy to focus on their purpose.

Characteristics of Norming

Look for the following behaviours in the norming stage:

- Ground rules and formal procedures that may have been overlooked in the beginning are now taken more seriously.
- The team will want to discuss items more; less time will be spent on idea generation, and more on decision making.
- Members will want to limit agenda items to focus on specific topics.
- Subgroups may be formed to move along faster.
- Conflicts are addressed and resolved.

How to Address the Norming Stage

At this stage, the team has PROCESS down fairly well. TASK will take on new significance as the team will want to accomplish its purpose. Facilitators should keep this in mind and remind the team of
the task. Also, facilitators should be more diligent in adhering to the road map, providing time for feedback, closure, etc.

**Phase 4: Performing - The Action Stage**

Forming, Storming, Norming, then Performing, the final stage of team development. Performing teams are just that, a highly effective, problem-solving unit that can reach solutions quickly and can even head off issues before they become problems.

**Characteristics of Performing**

A team in the performing stage will:

- Be productive! Tasks will be accomplished, and the team will look for more to do.
- Be pro-active, and not necessarily wait for direction from management.
- Demonstrate loyalty to the group, and respect individual dissension and disagreement.

**How to Address the Performing Stage**

Teams at the performing level are generally self-regulating. Road maps, processes, decision making and other matters of team management will be handled independently by the team.

![Figure 12: Productivity and Morale in Team Development Stages](image)

**Managing Remote Teams**

Thanks to technology and globalization, more and more business teams are working together across state lines and international borders. Many corporations employ "dispersed teams," where a manager in New York may communicate daily with colleagues in Boston, Los Angeles, and Singapore. But even with an array of new Web-based collaboration tools at their disposal, most managers find handling remote teams extremely challenging. In order to get the best out of your far-flung employees, you need to establish a clear communication routine, take extra steps to build trust, and review processes often to make sure they're working for everyone. Whether your employees are in other
company offices, working from home, or a little bit of both, these tips will help keep your team running smoothly.

- **Build a Strong Team, Starting with You** - Make sure you’re up for the task of managing remotely.
- Managers who run dispersed teams successfully share several traits. They work a lot, they travel — some more than half the time — and they thrive on their work and the culture they’ve created.
- Remote managers need more energy, because a lot of what you have to do is transfer that energy to your team.

The successful remote manager has the following traits:

- **Passion**: A remote set-up won’t work unless your employees are motivated and running in sync — collaborating, asking each other for help, sharing ideas. That energy has to start with you. You don’t need to start each day smiling from ear to ear, but if you’re annoyed every time an IM breaks your train of thought or you’re not good about remembering to check in with people, running remote teams probably isn’t for you.
- **Availability**: Good remote communication requires extra effort. You need to go out of your way to address issues that would come up naturally and spontaneously if you all worked in one place. When your staff is spread across a number of time zones, they need to feel comfortable calling you at odd hours — even if it’s dinner hour. Beyond the guidance or answers you can provide, which allows them to move forward with their work, your availability shows support, which helps strengthen your relationships with everyone. That said, establish reasonable guidelines about when to call.
- **Patience**: A two-hour dinner with an employee across the country may take up two days with travel time. And it may take two hours instead of 10 minutes to schedule a conference call. The lesson here? Budget extra time for common group tasks. This doesn’t necessarily hurt productivity. For instance, conference calls are usually shorter and more to the point than a meeting in person, where members of the group are bound to do more small talk.
- **Reliability**: By doing what you say you’ll do — whether it’s helping solve a problem or sending a new laptop — you foster trust. Your reliability shows respect for what your workers are doing. Without that, they’ll quit asking for help, and you’ll fall out of the loop. Trust is particularly important in distance relationships, you build trust through actions that demonstrate reliability, integrity, and familiarity.

Here are more ways to build trust in remote teams:

- Be available. Don’t let employee calls go to voicemail. When you absolutely can’t be reached, reply ASAP.
- Beware of using sarcasm and teasing in distance interactions, like email and conference calls, where signals can easily get crossed.
• Handle sensitive issues with discretion. One team member might tell Belmont that another is having a bad day. He’ll immediately call the person having the bad day, without exposing the colleague who told him.
• Communicate in a variety of ways (email, phone, in person, etc.) and often.
• Visit employees on their turf. It shows respect for their time and interest in their life outside the job.

A dispersed team depends on people who can be productive without a boss roaming the hallways or a trusted co-worker sitting nearby. Team members should be motivated, disciplined, and flexible with their time, allowing them to connect with clients or co-workers in different time zones. “People who like to quit at 5 p.m. aren’t the people who work well remotely. They also need to communicate clearly in writing (since e-mail and instant messaging are the new standard for daily communication) and should be willing to suggest ideas, ask for and offer help, make decisions, and collaborate.

Below are a few suggestions for setting up a remote work arrangement.
• **Match people to the work.** Extroverts and idea people tend to like tasks that require frequent and on-going communication. Make sure they’re in an office with teammates they can collaborate with. Introverts and people confident making decisions can work more easily at home or on solo projects.
• **Match work to the time zone.** If some employees are working while others sleep, try to avoid assigning work that leaves team members perpetually in the hurry-up-and-wait cycle, as their counterparts half a world away complete their part of a project.
• **Assign backups.** For the most critical tasks, make sure you or someone else in your group can fill in on a moment’s notice, like when someone is ill or quits. (And make sure you can access a remote worker’s files and contacts from afar.)
• **Sign an agreement.** Specify when and how much a person may need to work, times they need to be available, performance objectives, and frequency of in-person meetings. This codifies expectations and provides something tangible for your employee to refer back to.
• **Assess.** At least a few times a year, ask what’s working and what’s not, then make changes if necessary. Withdrawal is a common sign of a problem. Even if a person is meeting deadlines and producing quality work, they may be unhappy if you hear from them less and less.

**Coaching and Mentoring Skills for Managers**
Mentoring is a relationship built on trust, and one of its primary goals is to make a less experienced person (or persons new to a field of endeavour) more confident in their abilities and talents. Traditionally mentoring involves an older member of the same profession--a person with more experience and connections--helping a newcomer to the field. Rather than focus on a particular skill, task or goal, mentoring is a long-term, on-going process. It is usually a more personal relationship, based in shared experience. As the newcomer grows, the mentoring relationship evolves. The mentor often passes on not only tangible knowledge, but also philosophy, advice and advantages gleaned from years in the field. The mentor may provide introductions to people or organisations to which a
newcomer would not normally have access. Mentors generally provide guidance, not for personal gain, but out of a desire to help another individual realize his full potential.

**Types of Mentoring**

Mentoring is often divided into two types:

**Informal** mentoring relationships develop on their own, such as when a person approaches a possible mentor and that person agrees to form a mentoring relationship.

**Formal** mentoring relationships refer to assigned relationships, in which the organisation oversees and guides the mentoring program in order to promote employee development.

Note that this does not mean it is black and white; rather it is more of a continuum with formal on one end and informal on the other end. For example, an organisation may guide and oversee a mentoring program, in addition to providing learning opportunities to both the mentors and protégés, but may not assign the relationships. Limitations on formal mentoring programs include the small number of mentoring relationships they can support and accommodate may lead to dissatisfaction with the relationship and negative feelings of those not involved with the program.

As far as the mentor and mentee’s relationship, it has been documented that mentee’s in informal relationships received more career-related advice and had better career outcomes.

These two types of mentoring can further be divided into three forms:

1. **Traditional mentoring** in which there is a long-term relationship where a mentor guides the mentee’s career.

2. **Special project mentoring** in which a mentor helps to guide a mentee’s short-term project (normally lasting a few weeks to a few months).

3. **Peer mentoring**: Peer mentoring assigns mentees to someone with experience who is in their age group. Peer mentoring usually occurs in educational settings, either consisting of one-on-one relationships or group mentoring. Group mentoring consists of a mixture of experienced and new people working together to support one another. Groups meet face to face and via electronic conferencing at a designated time to discuss issues.

In addition, mentoring programs can be internal, where it is developed and managed inside of the organisation, or external (developed on the outside). And like other forms, it can also be a hybrid combination of the two. Some other mentoring programs include:

**Online mentoring programs**

In addition to traditional mentoring programs, various industries have set up online mentoring programs for people who cannot meet face to face with experienced people. These organisations, such as SCORE, which counsels small business owners, work with people around the world who are seeking advice on business and education. These companies use online conferencing tools or telecommunications to connect mentors with mentees on designated days.
Workplace mentoring

Workplace mentoring is almost the same as mentoring anybody at all except that this kind of relationship takes place in the organisational or office setting. The way workplace mentoring differs is that it is taken care that while mentoring a person, the goals of a person as well as the organisation should be achieved within the given time. The concept is carried out in a way that a senior person at a workplace guides the newly recruited persons or interns about the guidelines of workplace and other requirements. If the person is new in the field, the mentor will guide him about gaining the technical knowledge as well as organisational guidelines. A workplace mentor can take the help of other people in order to guide a person assigned under him. The benefit of this relationship is that the new employee or intern can easily cope with the given roles and perform at an optimal level through working under the guidance of the mentor. In conclusion, the concept of workplace mentoring is advantageous to both organisation as well as a person who has newly joined an organisation.

Eight Pillars of Coaching and Mentoring

Every person benefits from a coach/mentor during his life. Good mentoring can be boiled down to a few important principles

- **Co-equality:** Good mentors see themselves as co-equals or co-learners with their mentees. Mentors can benefit as much as their mentees or more from the process of providing insight and leadership to their peers.

- **Two-Way Street:** In a mentoring relationship, it is not only the mentee who should be seeking out the mentor. Older colleagues or acquaintances acting as mentors should reach out to their less-experienced counterparts too.

- **Listen:** Good mentors know how to listen. Great mentors know that listening is as important, if not more important, than talking. When it is time to respond, the listening you've done will give a clear picture of what to say.

- **Professional to personal issues:** When mentoring someone in a professional setting, start off the relationship with advice, insight and leadership related specifically to work. Only after the mentee brings up personal issues and only if you are comfortable addressing them, should you go beyond professional concerns.

- **Humanize yourself:** Share both successes and failures. Don't make yourself out to be a superstar. This might alienate a vulnerable mentee and make him feel that failure is not an option. Present a full picture of how you came to be where you are today.

- **Time management:** Maintain a regular schedule of meetings with your mentee. This helps ease some of the pressure on both mentor and mentee to reach out to each other. Set regular dates and times, and vary the meeting place to help refresh both parties.

- **Goals:** Mentees need to know their own goals before seeking out a mentor. They also should be able to articulate them to help a mentor know how best to provide insight and leadership.

- **Decisions:** In order to benefit from a mentoring relationship, mentees need to own their educational or professional experience. A mentor can't make decisions on behalf of a junior colleague or acquaintance. Be honest with yourself and your mentor about what you want.
To mentor properly and effectively, it can be helpful to follow and understand certain key principles.

- **Positivity:** One of the most important principles of effective mentoring is providing an attitude and overall atmosphere of positivity. A strong foundation of support is crucial to developing and maintaining a successful relationship between a mentor and a protégé. In order to foster an environment where an individual can grow and thrive, it is important to offer self-confidence and self-esteem.

- **Trust:** A mentoring relationship can go nowhere without trust. A mentor and mentee need to be able to communicate freely and openly, without fear of being judged or looking stupid. The primary base of a mentoring relationship should be mutual respect. A mentee needs to feel the utmost confidentiality and privacy in his relationship with his mentor.

- **Backing Off:** One very important element of mentoring knows exactly when to back off and step away. When guiding someone, situations can often get tense due to everything from differing opinions to difficulties in picking up and mastering new skills. Approach and timing are both vital when it comes to offering any new suggestions or ideas. Do not be pushy, and allow the person you are mentoring to have some space and grow, when necessary. Not everything comes overnight to everybody.

- **Motivation:** Although a mentor is there to gently guide another person through a situation or goal, it is also vital that the person does not view the mentor as a crutch of support. Mentors need the ability to successfully motivate and encourage others to be able to think independently. Question the person you are mentoring and promote the concepts of higher thinking and sharpening of critical-thinking skills.

- **Consistency:** To mentor someone effectively, it is crucial to have discussions on a consistent and regular basis. Frequent contact and reinforcement is necessary for the guidance of a mentor to have lasting impact on another person. Mentors need to be willing to put the time in for nurturing and guiding another person.

Mentoring programs help employees do the right thing by exposing them to senior employees that know how to do the right thing. This helps the employee perform more effectively and gives the employee more satisfaction.

The benefits to the employee are obvious, but what are the benefits to the organisation?

- **On boarding** - Speed up the process of bringing on new hires and speed up the process of redeploying existing employees into new lines of work. Bring them up to speed quickly and effectively. Studies have shown that the first month of a new hire or new assignment is critical to the overall success of that employee's tenure with the organisation. Mentoring provides a key resource to these employees during this crucial learning phase.

- **Employee satisfaction** - Studies have shown that employees that participate in mentoring programs have a higher job satisfaction. Higher job satisfaction leads to increased productivity and reduced turnover.
• **Employee retention** - Studies have shown that employees that are mentored stay on the job longer than those that are left to sink or swim. A high percentage of turnover is directly caused by employees not knowing how to do their job. Give employees the ability to do their job correctly and effectively and they will stay longer and give better results.

• **Employee productivity** - Employees participating in mentoring programs have an effective mechanism for getting answers quickly, allowing them to move on quickly. Employees that have to rediscover or re-invent solutions to common problems not only waste time that could be better spent but may also introduce new and costly problems into the organisation when they solve their problems incorrectly. What makes this worse is when the new ‘solution’ is left in place and then taught to other employees.

• **Career Growth / Succession Planning** - Mentoring programs provide an effective way to provide a career growth path to your employees. Growing your employees into more senior positions is an effective way to reduce hiring and turnover costs and keep employees continually striving to be the best that they can be. Mentoring is an effective mechanism for grooming employees to fill key roles as part of your organisation’s succession plan.

• **Knowledge management and retention** - For many organisations, the knowledge retained in key individuals is the most valuable part of the organisation. When these key individuals leave, this valuable information leaves with them. That is, unless your organisation has an effective mentoring program that allows and encourages these key employees to share their knowledge and skills with other employees. Not only does this benefit the organisation by reducing the risk of loss of key skills and knowledge, but it also helps reduce the load on the key employees. Freeing up key employees from day to day crisis management allows them to do what they do best, whether that is innovating, generating sales, or any of the other crucial features of a successful organisation. Key employees are key because they are good at what they do and would rather do what they do well than constantly manage crises created from others that are less skilled. Spread their knowledge to others and it frees them from this burden.

• **Quality** - Dr W. Edwards Deming has shown that organisations that actively care about the quality of their organisation are more profitable. The first step to improved quality is making sure everyone is following your current internal process. You cannot improve your internal processes if everyone is ignoring them. The best way to insure consistency is to make sure junior employees are taught the right way in the first place.

• **Synergy** - Mentoring gives employees, both mentors and mentees the opportunity to be better and more productive than either could be individually. Mentor - mentee teams accomplish more than individual contributors because the highly skilled mentor can focus more effectively on the high skilled areas of his work while off-loading the less skill-intensive work to the mentee. The mentee performs more effectively because he is working within his current range of expertise and does not get stuck or road blocked trying to handle things outside his skill level. As a member of the team, the mentee not only learns how the mentor handles the highly skilled aspects of the job, but also gets credit for the successes of the
team, leading to increased enthusiasm and performance in the job. As an added benefit to the
mentor, when senior employees mentor others, they hone their own skills more effectively in
the process.

- **Reduce frustration** - Employees that don't understand their jobs and don't know where to go
  for help become frustrated. Frustration leads to morale problems beyond the individual
  employee and lead to higher turnover. Mentoring provides an avenue for employees to find
  resources and answers to problems, to empower employees to resolve their problems
  themselves.

**Limitations of mentoring**

Although there are many benefits, it would not be fair to also highlight the limitations of mentor. Some
of them are:

- Time consuming
- Often the mentor is the supervisor and all the power lays with the coach
- The mentor might have bad habits!

**Coaching vs. Mentoring**

Coaching and mentoring are two ways in which people with vast experience help those in the same
field of endeavour who have less experience. Coaching usually deals with specific skills and tactics,
while mentoring often is a long-term process and a more personal is formed. In both coaching and
mentoring the goal is to help people to reach their full potential.

**Coaching**

Coaching takes many forms. In a basic sense it is a method of training, directing or instructing a
person or group of people to do a specific task, achieve a goal or develop certain skills.

A coach seeks to impart information by any one or any combination of methods including:
motivational talks, seminars, workshops, clinics and supervised practice. Often coaching involves
monitoring the performance of the skill or task and giving feedback on how to improve. This feedback
cycle can be performed multiple times. Coaching is appropriate for specific skills and short-term goal-
oriented situations.

**Benefits of Coaching**

The corporate mentoring/coaching programs are a great way for companies to show that they value
their employees.

- Team Building
- Talent Development
- Employee Retention
- Skill Development
- Cost Effective
- Development of institutional knowledge
Limitations of Coaching

Although there are many benefits, it would not be fair to also highlight the limitations of coaching. Some of them are:

- Time consuming
- Often the coach is the supervisor and all the power lays with the coach
- The coach might have bad habits

Coaching and mentoring connection process

In this section we will look at introducing the process to the role players. This process is a guide and will be discussed under the following headings:

**Figure 13: Coaching Process**

![Coaching Process Diagram]

**Phase 1: Plan the program’s purpose and design:**

This will link to the section or department’s strategic objectives and the manner in which that department functions. There is not a “one size fits all” approach to mentoring. Questions around duration and frequency of meetings will be determined by the nature of the division or department.

**Phase 2: Identify potential mentors and mentees:**

Again there are different ways of doing this. Each organisation will decide what the criteria would be for mentors or mentees. Elements to consider could be reasons for mentoring (performance management, learnerships etc.)
Phase 3: Facilitate a joint orientation (mentor, mentee and supervisor):
This can be done in various ways, individual meetings to workshops are all methods to orientated all role players about the extent of the mentoring program, roles and responsibilities

Phase 4: Match mentors and mentees.
Matching mentors and mentees is really more of an art than a science. While effective matching certainly calls for impartial judgments, based upon objective facts and thorough assessments of the participants; it also calls for a healthy dose of intuition. The goal of your matching process is to provide the mentees in your program with the most appropriate mentor. When considering potential matches, ensure both the prospective mentor and mentee:

- Meet your program's eligibility criteria;
- Have a look at some of the important criteria to consider in creating compatible matches: Needs, Gender, Location, Age, Race/Ethnicity, Interests, Values, Personalities, Life Experiences, and Preferences.
- Are committed to the conditions of the match and the mentoring relationship

Managing of Challenging Behaviours
Building and leading a successful team depends on co-operation between all members of the group. But what if an individual just won't play ball…? Confrontations between leaders and team members are unproductive, take up time and most importantly create a bad atmosphere, lowering the morale of the team. One of the most difficult leadership competencies in our view is dealing with conflict. So, what's the best approach? First of all – let's take a look at why conflict occurs – then it'll be easier to see how to deal with it.

Why do people become difficult?
1. The limit of their capabilities has been reached: This could be in terms of skill set or physical workload… they start to make errors and don’t deliver to the required standard… this causes frustration with peers.
2. They become disengaged: This can often be caused by frustration when high-achievers are held back for a long period of time – they will tend to withdraw from the team.
3. They get distracted: Focus is key and if it moves elsewhere, effectiveness is reduced. Quite often the cause of distraction is for personal reasons and while colleagues will be sympathetic initially – the issue can become tedious for all.
4. Loss of motivation: Too little or too much delegation or challenge in the role can bring about de-motivation. This can quickly affect the morale of others as well as themselves and is dangerous to productivity.

Practical tips for dealing with difficult people:
(In the examples and scenarios here we use “Steve” as our difficult person)
1.) Start with yourself – you are leading a team – your position means you are an important factor in Steve’s dissatisfaction whether you like it or not. Individual differences in outlook or style can generate tension which could be used constructively or, if left unchecked can cause problems.

2.) Ask yourself whether you’ve explained new initiatives clearly enough to Steve – could he be causing insecurity or anxiety– remember people generally do not like change – and when emotions like fear come into play, people start to behave irrationally.

3.) Ask peers and other team members whether you come across as approachable and accessible – one of the best ways to deal with conflict is to get a balanced view on your personality traits. At least you then know the starting point for resolution.

4.) Decide whether you’ve made unreasonable demands of Steve. People don’t tend to admit when they are overloaded or out of their depth, for fear of reprimand. Go back and check and give them the opportunity to be honest.

5.) Find out if you’ve been unfair in your praise of others or criticism of poor old Steve. Consult trusted members of the team and Steve himself. Remember, if you are leader, you have the power to ‘play with peoples’ lives’ – seemingly innocuous comments can be taken in the wrong way.

6.) Find out what motivates each member of the team – ask yourself if you are over or under delegating to Steve. Over-delegating can cause a real fear of failure, causing unnecessary conflict.

7.) Arrange time off for Steve (and we’re starting to feel really sorry for him now) if there is a personal issue lurking behind the scenes – listen sympathetically to the issues but make sure you recognise when the problem is beyond your ability to help and figure out how to bring in the right people if required.

8.) If Steve has become disengaged, explore the causes face to face. It’s possible that if he has recently joined your team you need to release the burden of all the past broken promises and build up new trust again.

9.) If conflict has arisen due to Steve being simply overloaded, offer support and training if required over a reasonable timescale – but make it clear if improvement doesn’t materialise that his future in your team is limited.

10.) It’s your job as a leader to get to know your team members really well. You will then be able to notice changes in their mood, patterns of work, or work/life balance which often signal stress and potential conflict.

Dealing with difficult people generally is definitely one of the more difficult leadership competencies. It is tempting to work round a difficult person and to ‘sweep them under the carpet’ but you will only undermine the standards you’ve set for the team and your own position. Other members of the team will also realise that being difficult gets them out of dealing with the tasks they don’t like. As a leader – don’t bury these issues… work hard to deal with them early on in the process. Remember, many
people do not cope well in adversarial situations and may even sabotage their own future because they cannot see a simple way out of the conflict. If your fair and balanced approach cannot resolve the issue – don’t be afraid to involve your organisation’s disciplinary policy to prevent wider problems from occurring.

Managing Pressure: Urgency vs Important

We've all been there: The project is due for today's meeting and we are only three quarters done. We're anxious, we can't concentrate, everything is a distraction, and then, finally, we blow. Time stressors are the most pervasive source of pressure and stress in the workplace and they happen as a result of having too much to do in too little time.

With this kind of pressure all too common, effective time management is an absolute necessity. You probably use a day-planner and to-do list to manage your time. These tools are certainly helpful, but they don't allow you to drill down to one of the most essential elements of good time management: distinguishing between what is important and what is urgent.

Great time management means being effective as well as efficient. Managing time effectively, and achieving the things that you want to achieve, means spending your time on things that are important and not just urgent. To do this, and to minimize the stress of having too many tight deadlines, you need to understand this distinction:

- **Important** activities have an outcome that leads to the achievement of your goals.
- **Urgent** activities demand immediate attention, and are often associated with the achievement of someone else's goals.

Urgent activities are often the ones we concentrate on. These are the "squeaky wheels that get the grease." They demand attention because the consequences of not dealing with them are immediate. The Urgent/Important Matrix is a powerful way of thinking about priorities. Using it helps you overcome the natural tendency to focus on urgent activities, so that you can keep clear enough time to focus on what's really important. This is the way you move from "fire fighting", into a position where you can grow your business and your career. Here's how it works:

The matrix can be drawn as shown below, with the dimensions of Importance and Urgency.
The steps below help you use the matrix to prioritize your activities:

1. The first step is to list all the activities and projects you feel you have to do. Try to include everything that takes up your time at work, however unimportant. (If you manage your time using an Action Programme, you’ll have done this already.)

2. Next, assign importance to each of the activities – you can do this on, say, a scale of 1 to 5: remember, this is a measure of how important the activity is in helping you meet your goals and objectives. Try not to worry about urgency at this stage, as this helps get to the true importance.

3. Once you have assigned importance to each activity, evaluate the urgency of each activity. As you do this, you can plot the listed items on the matrix according to the assigned importance and urgency.

4. Now study the matrix using the strategies described below to schedule your priorities.

**Strategies for Different Quadrants on the Matrix**

**Urgent and Important:** There are two distinct types of urgent and important activities: Ones that you could not foresee, and others that you have left to the last minute. You can avoid the latter by planning...
ahead and avoiding procrastination. Issues and crises, on the other hand, cannot always be foreseen or avoided. Here, the best approach is to leave some time in your schedule to handle unexpected issues and unplanned important activities. And if a major crisis arises, some other activity may have to be rescheduled. If this happens, identify which of you urgent-important activities could have been foreseen and think about how you could schedule similar activities ahead of time, so they do not become urgent.

**Urgent and Not Important:** Urgent but not important activities are things that stop you achieving your goals, and prevent you from completing your work. Ask yourself whether these tasks can be rescheduled, or whether someone else could do them. A common source of such interruptions is from other people in your office. Sometimes it's appropriate to say "No" to people, or encourage them to solve the problem themselves. Alternatively, try allocating time when you are available so that people only interrupt you at certain times (a good way of doing this is to schedule a regular meeting so that all issues can be dealt with at the same time.) By doing this, you'll be able to concentrate on your important activities for longer periods of time.

**Not Urgent, but Important:** These are the activities that help you achieve your personal and professional goals, and complete important work. Make sure that you have plenty of time to do these things properly, so that they do not become urgent. And remember to leave enough time in your schedule to deal with unforeseen problems. This will maximize your chances of keeping on schedule, and help you avoid the stress of work becoming more urgent that necessary.

**Not Urgent and Not Important:** These activities are just a distraction, and should be avoided if possible. Some can simply be ignored. Others are activities that other people may want you to do, but they do not contribute to your own desired outcomes. Again, say "No" politely and firmly if you can. If people see you are clear about your objectives and boundaries, they will often not ask you to do "not important" activities in the future.
SECTION 5: MANAGING CHANGE, COMMUNICATION AND ACTION PLANS

Understanding Change and How Teams Respond

“It is not the strongest species that survive, nor the most intelligent, but the ones are most responsive to change” - Charles Darwin

Change Management is a structured approach to transitioning individuals, teams and organisations from a current state to a desired future state. The current definitions of Change Management include both organisational change management processes and individual change management models, which together are used to manage the people side of change. Some thoughts on change to consider:

Change takes time, but quick-fixes are essential to make it happen; You can’t expect to get everything right, so expect mistakes - don’t be paralysed at the possibility of making them; If you wait until all the facts are in, they’ll be useless and the biggest risk in change processes is to avoid taking any risks at all.

Understanding what change is

Change Management is most commonly understood from four basic perspectives which define the concept, process and tools. In thinking about what is meant by “Change Management,” at least four basic definitions come to mind:

1. The task of managing change.
2. An area of professional practice.
3. A body of knowledge.
4. A control mechanism.

1. The Task of Managing Change: The first and most obvious definition of “Change Management” is that the term refers to the task of managing change. The obvious is not necessarily unambiguous. Managing change is itself a term that has at least two meanings. One meaning of “managing change” refers to the making of changes in a planned and managed or systematic fashion. The aim is to more effectively implement new methods and systems in an on-going organisation. The changes to be managed lie within and are controlled by the organisation. (Perhaps the most familiar instance of this kind of change is the “change control” aspect of information systems development projects). However, these internal changes might have been triggered by events originating outside the organisation, in what is usually termed “the environment.” Hence, the second meaning of managing change, namely, the response to changes over which the organisation exercises little or no control (e.g. legislation, social and political upheaval, the actions of competitors, shifting economic tides and currents, and so on). Researchers and practitioners alike typically distinguish between a knee-jerk or reactive response and an anticipative or proactive response.
2. **An area of professional practice:** The second definition of Change Management is "an area of professional practice." There are dozens, if not hundreds, of independent consultants who will quickly and proudly proclaim that they are engaged in planned change, that they are change agents, that they manage change for their clients, and that their practices are change management practices. There are numerous small consulting firms whose principals would make these same statements about their firms. And, of course, most of the major management consulting firms have a change management practice area. Some of these change management experts claim to help clients manage the changes they face – the changes happening to them. Others claim to help clients make changes. Still others offer to help by taking on the task of managing changes that must be made. In almost all cases, the process of change is treated separately from the specifics of the situation. It is expertise in this task of managing the general process of change that is laid claim to by professional change agents.

3. **A body of knowledge:** Stemming from the view of change management as an area of professional practice there arises yet a third definition of change management: the content or subject matter of change management. This consists chiefly of the models, methods and techniques, tools, skills and other forms of knowledge that go into making up any practice. The content or subject matter of change management is drawn from psychology, sociology, business administration, economics, industrial engineering, systems engineering and the study of human and organisational behaviour. For many practitioners, these component bodies of knowledge are linked and integrated by a set of concepts and principles known as General Systems Theory (GST). It is not clear whether this area of professional practice should be termed a profession, a discipline, an art, a set of techniques or a technology. For now, suffice it to say that there is a large, reasonably cohesive albeit somewhat eclectic body of knowledge underlying the practice and on which most practitioners would agree — even if their application of it does exhibit a high degree of variance.

4. **A control mechanism:** For many years now, Information Systems groups have tried to rein in and otherwise supervise on changes to systems and the applications that run on them. For the most part, this is referred to as “version control” and most people in the workplace are familiar with it. In recent years, systems people have begun to refer to this control mechanism as "change management" and "configuration management." Moreover, similar control mechanisms exist in other areas. Chemical processing plants, for example, are required by OSHA (Occupational Safety and Health Administration) to satisfy some exacting requirements in the course of making changes. These fall under the heading of Management of Change.

**The content and process dimensions of change**

Organisations are highly specialised systems and there are many different schemes for grouping and classifying them. Some are said to be in the retail business, others are in manufacturing, and still others confine their activities to distribution. Some are profit-oriented and some are not for profit. Some are in the public sector and some are in the private sector. Some are members of the financial services industry, which encompasses banking, insurance, and brokerage houses. Others belong to
the automobile industry, where they can be classified as original equipment manufacturers or after-market providers. Some belong to the health care industry, as providers, as insured's or as insurers. Many are regulated, some are not. Some face stiff competition, some do not. Some are foreign-owned and some are foreign-based. Some are corporations, some are partnerships, and some are sole proprietorships. Some are publicly held and some are privately held. Some have been around a long time and some are newcomers. Some have been built up over the years while others have been pieced together through mergers and acquisitions. No two are exactly alike.

The preceding paragraph points out that the problems found in organisations, especially the change problems, have both content and a process dimension. It is one thing, for instance, to introduce a new claims processing system in a functionally organised health insurer. It is quite another to introduce a similar system in a health insurer that is organized along product lines and market segments. It is yet a different thing altogether to introduce a system of equal size and significance in an educational establishment that relies on a matrix structure. The languages spoken differ. The values differ. The cultures differ and at a detailed level, the problems differ. However, the overall processes of change and change management remain pretty much the same, and it is this fundamental similarity of the change processes across organisations, industries, and structures that make change management a task, a process, and an area of professional practice.

Why do Organisations Resist Change

- **Structural inertia**: Traditionally organisations are designed to maintain order and stability. When confronted with the forces that created stability often resist change and cause structural inertia.

- **Cultural inertia**: Some organisations have cultures that emphasise stability and tradition.

- **Work Group inertia**: Because of the development of strong group norms that help to guide member behaviours, potent pressures exist to perform jobs in a certain way. Change often disrupts these established normative expectations, leading to formidable resistance.

- **Threats to existing power relationships**: Any redistribution of decision-making authority can threaten long established power relationships within the organisation. Certain individuals may resist change because they fear the loss of their power base. Changes from autocratic to participative management or self-managed teams are often seen as threatening by supervisors and middle managers.

- **Threats to resource allocation**: Individuals and groups may believe that change will threaten future resource allocation. In particular, those groups or individuals who control sizeable resources often seen change as a threat.

- **Previously unsuccessful change efforts**: Organisation members who went through previously unsuccessful change efforts may resist change and may be very cautious about accepting any further attempts at introducing changes into their system. Individuals may also resist change because they are aware of potential problems that have apparently been overlooked by the change initiators.
Overcoming Resistance

The pressures of changes threaten many traditional and long held ways of managing and working. Dealing with change is among the greatest challenges facing managers and workers in modern day business management. Various authors indicate that it would be wise, when an organisation is highly unionised, to view the trade union representatives as full stakeholders in any change or transformation. Union representatives have to be involved in order to avoid eventual collective resistance to change by the workforce, because any form of change will have an impact on the employees of the organisation. The degree and nature of such impact will vary from organisation to organisation, among the union representatives, and among the workforce. The impact experienced by employees collectively is one of the most important factors requiring professional attention during any process of change or transformation.

A six-step process approach to overcoming resistance to change should be implemented sequentially:

- **Step 1**: Mobilise commitment to change through joint diagnosis of business problems. Help all employees to develop a shared diagnosis of what is wrong in an organisation and what can and must be done about it.
- **Step 2**: Develop a shared vision of how to organise for competitiveness. Once commitment is obtained to the analysis of a problem, managers lead employees towards a task-aligned vision of the organisation that defines new roles and responsibilities.
- **Step 3**: Foster not only consensus for the new vision, but also the necessary competence to enact it and required cohesion to move it along. Since employee commitment to change is uneven (some are enthusiastic, others are lukewarm, etc.) and everyone needs to develop competencies to make the changes work, and support mechanisms need to be in place. Managers who cannot adapt to change and transformation issues during this period must be replaced.
- **Step 4**: Spread revitalisation to all departments without pushing it from the top. Use teams to break down resistance by enlisting their feedback about how to organise their department and responsibilities.
- **Step 5**: Institutionalise revitalisation through formal policies, systems and structures. Enact changes in structures and systems that are consistent with change and transformation during this step (not earlier).
- **Step 6**: Monitor and adjust strategies in response to problems in the revitalisation process. Monitoring the change and transformation process needs to be shared by all employees through use of an oversight team - key manager(s), union leaders, secretary, engineer, someone from finance, etc. Regular attitude surveys to monitor behaviour patterns are also essential.

When in your efforts to implement strategies and plans you experience resistance, the most popular assumption is that you have a communication problem and the need is for greater clarity regarding
the vision or change management strategy. Perhaps you have not defined the problem in dramatic enough terms, built a hot enough fire for the platform. Maybe you assume that you have not been clear enough about the vision, or that that the strategy doesn’t go into enough detail.

However when dealing with polarities, the clearer the communication, the greater the resistance generated. Some people, seen as resisters, are unwilling to sacrifice the benefits of current ways of doing business and only too clearly see the downside of the proposed strategy. It’s not that people don’t understand your interests – it’s that every time you try explaining them again, you confirm that you don’t understand theirs. And paradoxically, what you thought was your best solution becomes your greatest problem.

**Managing Change Effectively**

Different kinds of change require different strategies and plans to effectively gain employee engagement and acceptance of change. The three types of change that occur most frequently in organisations are developmental, transitional and transformational. Change management theories effectively support how to deal with developmental and transitional change, but are less effective at dealing with successfully implementing transformational change. A critical step in determining which approach to use in overcoming resistance to implementing organisation change is to determine which type of change the organisation is experiencing.

**Developmental Change**

Developmental change occurs when a company makes an improvement to their current business.

If a company decided to improve their processes, methods or performance standards this would be considered developmental change.

Companies are continually processing developmental change to some degree in order to stay competitive. This type of change should cause little stress to current employees as long as the rationale for the new process is clearly conveyed and the employees are educated on the new techniques. When senior management want to bring about a major change such as the decision to close a division, if the company attempted to implement developmental change as the first step in streamlining the business, employees may be more likely to accept the change. The employees could see that the company attempted different strategies before determining that closing the division was the only option.
Transitional Change

Transitional change is more intrusive than developmental change as it replaces existing processes or procedures with something that is completely new to the company.

The period when the old process is being dismantled and the new process is being implemented is called the transitional phase.

A corporate reorganisation, merger, acquisition, creating new products or services, and implementing new technology are examples of transitional change. Transitional change may not require a significant shift in culture or behaviour but it is more challenging to implement than developmental change. The future of the organisation is unknown when the transformation begins which can add a level or discomfort to employees.

The outcome of transitional change is unknown so employees may feel that their job is unstable and their own personal insecurities may increase. Education on the new procedures should be commenced at each stage of the new process. This will allow employees to feel that they are actively involved and engaged in the change. As an employee’s level of engagement in the new procedure increases, their resistance to change may decrease. Management should be cognizant of the impact and stress these changes will have on their employees. The company should continue to inform the employees of their status and offer support in helping them deal with the personal adjustments they will be forced to make.

Transformational Change

Transformational change occurs after the transition period.

Transformational change may involve both developmental and transitional change.

It is common for transitional and transformation change to occur in tandem.

When companies are faced with the emergence of radically different technologies, significant changes in supply and demand, unexpected competition, lack of revenue or other major shifts in how they do business, developmental or transitional change may not offer the company the solution they need to stay competitive. Instead of methodically implementing new processes, the company may be forced to drastically transform themselves.

A very useful framework for thinking about the change process is problem solving. Managing change is seen as a matter of moving from one state to another, specifically, from the problem state to the solved state. Diagnosis or problem analysis is generally acknowledged as essential. Goals are set and
achieved at various levels and in various areas or functions. Ends and means are discussed and related to one another. Careful planning is accompanied by efforts to obtain buy-in, support and commitment. The net effect is a transition from one state to another in a planned, orderly fashion. This is the planned change model.

The word “problem” carries with it connotations that some people prefer to avoid. They choose instead to use the word “opportunity.” For such people, a problem is seen as a bad situation, one that shouldn’t have been allowed to happen in the first place, and for which someone is likely to be punished — if the guilty party (or a suitable scapegoat) can be identified. For the purposes of this paper, we will set aside any cultural or personal preferences regarding the use of “problem” or “opportunity.” From a rational, analytical perspective, a problem is nothing more than a situation requiring action but in which the required action is not known. Hence, there is a requirement to search for a solution, a course of action that will lead to the solved state. This search activity is known as “problem solving.”

From the preceding discussion, it follows that “problem finding” is the search for situations requiring action. Whether we choose to call these situations “problems” (because they are troublesome or spell bad news), or whether we choose to call them “opportunities” (either for reasons of political sensitivity or because the time is ripe to exploit a situation) is immaterial. In both cases, the practical matter is one of identifying and settling on a course of action that will bring about some desired and predetermined change in the situation.

At the heart of change management lies the change problem, that is, some future state to be realized, some current state to be left behind, and some structured, organized process for getting from the one to the other. The change problem might be large or small in scope and scale, and it might focus on individuals or groups, on one or more divisions or departments, the entire organisation, or one or on more aspects of the organisation’s environment.

At a conceptual level, the change problem is a matter of moving from one state (A) to another state (a’). Moving from A to A’ is typically accomplished as a result of setting up and achieving three types of goals: transform, reduce, and apply. Transform goals are concerned with identifying differences between the two states. Reduce goals are concerned with determining ways of eliminating these differences. Apply goals are concerned with putting into play operators that actually effect the elimination of these differences (see Newell & Simon).

As the preceding goal types suggest, the analysis of a change problem will at various times focus on defining the outcomes of the change effort, on identifying the changes necessary to produce these outcomes, and on finding and implementing ways and means of making the required changes. In simpler terms, the change problem can be treated as smaller problems having to do with the how, what, and why of change.
The change problem is often expressed, at least initially, in the form of a “how” question.

- How do we get people to be more open, to assume more responsibility, to be more creative?
- How do we introduce self-managed teams in Department W?
- How do we change over from System X to System Y in Division Z?
- How do we move from a mainframe-centered computing environment to one that accommodates and integrates PCs?
- How do we get this organisation to be more innovative, competitive, or productive?
- How do we raise more effective barriers to market entry by our competitors?
- How might we more tightly bind our suppliers to us?
- How do we reduce cycle times?

In short, the initial formulation of a change problem is means-centered, with the goal state more or less implied. There is a reason why the initial statement of a problem is so often means-centered and we will touch on it later. For now, let’s examine the other two ways in which the problem might be formulated — as “what” or as “why” questions.

As was pointed out above, to frame the change effort in the form of “how” questions is to focus the effort on means. Diagnosis is assumed or not performed at all. Consequently, the ends sought are not discussed. This might or might not be problematic. To focus on ends requires the posing of “what” questions. What are we trying to accomplish? What changes are necessary? What indicators will signal success? What standards apply? What measures of performance are we trying to affect?

Ends and means are relative notions, not absolutes; that is, something is an end or a means only in relation to something else. Thus, chains and networks of ends-means relationships often have to be traced out before one finds the “true” ends of a change effort. In this regard, “why” questions prove extremely useful.

To ask “why” questions is to get at the ultimate purposes of functions and to open the door to finding new and better ways of performing them. Why do we do what we do? Why do we do it the way we do it? Asking “why” questions also gets at the ultimate purposes of people, but that’s a different matter altogether, a “political” matter, and one we’ll not go into in this handbook.

The approach taken to change management mirrors management’s mind-set

The emphasis placed on the three types of questions just mentioned reflects the management mind-set, that is, the tendency to think along certain lines depending on where one is situated in the organisation. A person’s placement in the organisation typically defines the scope and scale of the kinds of changes with which he or she will become involved, and the nature of the changes with which he or she will be concerned. Thus, the systems people tend to be concerned with technology and technological developments, the marketing people with customer needs and competitive activity, the
legal people with legislative and other regulatory actions, and so on. Also, the higher up a person is in
the hierarchy, the longer the time perspective and the wider the range of issues with which he or she
must be concerned.

For the most part, changes and the change problems they present are problems of adaptation, that is,
they require of the organisation only that it adjust to an ever-changing set of circumstances. But,
either as a result of continued, cumulative compounding of adaptive manoeuvres that were nothing
more than band-aids, or as the result of sudden changes so significant as to call for a redefinition of
the organisation, there are times when the changes that must be made are deep and far-reaching. At
such times, the design of the organisation itself is called into question.

Organisations frequently survive the people who establish them. At some point it becomes the case
that such organisations have been designed by one group of people but are being operated or run by
another. Successful organisations resolve early on the issue of structure, that is, the definition,
placement and coordination of functions and people. Other people then have to live with this design
and, because the ends have already been established, these other people are chiefly concerned with
means. This is why so many problem-solving efforts start out focused on means.

Some organisations are designed to buffer their core operations from turbulence in the environment.
In such organisations all units fit into one of three categories: core, buffer, and perimeter.

In core units (e.g., systems and operations), coordination is achieved through standardization, that is,
adherence to routine. In buffer units (e.g., upper management and staff or support functions),
coordination is achieved through planning. In perimeter units (e.g., sales, marketing, and customer
service), coordination is achieved through mutual adjustment (see Thompson).

People in core units, buffered as they are from environmental turbulence and with a history of relying
on adherence to standardized procedures, typically focus on “how” questions. People in buffer units,
responsible for performance through planning, often ask “what” questions. People in the perimeter
units are as accountable as anyone else for performance and frequently for performance of a financial
nature. They can be heard asking “what” and “how” questions. “Why” questions are generally asked by
people with no direct responsibility for day-to-day operations or results. The group most able to take
this long-term or strategic view is that cadre of senior executives responsible for the continued
wellbeing of the firm: top management. If the design of the firm is to be called into question or, more
significantly, if it is actually to be altered, these are the people who must make the decision to do so.

Finally, when organisational redefinition and redesign prove necessary, all people in all units must
concern themselves with all three sets of questions or the changes made will not stand the test of
time.
To summarise: Problems may be formulated in terms of “how,” “what” and “why” questions. Which formulation is used depends on where in the organisation the person posing the question or formulating the problem is situated, and where the organisation is situated in its own life cycle.

- “How” questions tend to cluster in core units.
- “What” questions tend to cluster in buffer units.
- People in perimeter units tend to ask “what” and “how” questions.
- “Why” questions are typically the responsibility of top management.

In turbulent times, everyone must be concerned with everything.

The Role of Change in the Organisation

Change management plays an important role in any organisation since the task of managing change is not an easy one. When we say managing change we mean to say making changes in a planned and systemic fashion. With reference to the IT projects we can say the change in the versions of a project and managing these versions properly. Changes in the organisation or a project can be initiated from within the organisation or externally. For example a product that is popular among the customers may undergo a change in design based on the triggering factor like a competitive product from some other manufacturer. This is an example of external factors that triggers a change within the organisation. How the organisation responds to these changes is what is more concerning. Managing these changes come under change management. Reactive and proactive responses to these changes are possible from an organisation.

Change management is done by many independent consultants who claim to be experts in these areas. These consultants manage the changes for their clients. They manage changes or help the client make the changes or take up the task themselves to make the changes that must be made. An area of change that needs attention is selected and certain models, methods, techniques and tools are used for making these changes that are necessary for the organisation.

When there is a process in an organisation it is not an easy task to make changes to this process immediately. Sometimes a single organisation may have varied business entities and changes in an entity may be reflected in another entity. In such organisations changes are not so easy. There are different types of organisations which have many branches across the world with varied cultures. Implementing a change in such organisations is a task by itself.

The change process can be thought of as a process which stops the current process, makes the necessary changes to the current process and the runs the new process. It is easy said than implemented. Stopping a current process in some industry is fatal for that organisation. Hence it has to be done in steps which have the minimal effect in the process. These changes cannot take place for a longer time in the organisation since that may also be a disaster for the organisation. The involvement of the staff concerned is also very important for the change process to be smooth.
The change process could also be considered as a problem solving situation. The change that is taking place could be the result of a problem that has occurred. You should know that a problem is a situation that requires some action to be taken positively to handle that situation. This positive action is known as problem solving. The change process could be problem solving for a particular situation. In this process there is a move from one state to another so that the problem gets solved. The change process is leaving the current state and moving to the final state through some structured organized process.

Managing the changes in an organisation requires a broad set of skills like political skills, analytical skills, people skills, system skills, and business skills. Having good analytical skills will make you a good change agent. You should evaluate the financial and political impacts of the changes that can take place. You should know that following a particular process at that instant would fetch you immediate financial effects and start that process so that the change process is noted by the management. The workflow has to be changed in such a manner to reflect the financial changes that are taking place. Operations and systems in the organisation should be reconfigured in such a manner that you get the desired financial impact. Hence change management plays an important role in an organisation. This allows the organisation to give a reactive or a proactive response to the changes that happen internally or externally. Knowing the change management and its process would help an organisation and its processes to be stable.

Performance improvement in organisations is built around three core areas of focus:

- Leadership sponsorship
- Project management
- Change management
This diagram shows the interrelations between these three core elements of performance improvement in any organisational environment. The application of all three will result in projects meeting organisational objectives, which directly results in delivery on time and on budget with a significant return on investment.

Successful change management in organisations therefore requires effective communication, full and active executive support, employee involvement, organisational planning and analysis and widespread perceived need for the change. These are the big five when successful change is achieved.

Drivers of change
Organisational change management is becoming increasingly important to the business community. The intensification of competition from manufacturers in emerging economies who can produce superior goods at cheaper prices, the introduction of new technology and changing consumer preferences and tastes can result in companies having to redefine their business goals and objectives.

The following factors are some of the primary drivers of organisational change.

- **Inadequate Financial Performance**: Companies that fail to achieve financial benchmarks are forced to evaluate their business objectives and processes. This is one of the most important drivers of organisational change. If a new competitor enters the market with...
cheaper labour or a superior technology, companies that formally enjoyed prosperity can suddenly find a cannibalization of their market share. A failure to maintain a competitive presence in the market place can stress company resources and force a rethink of the opportunity cost of capital and resource redeployment.

- **Change in Strategic Objectives**: If a company shifts its focus from a product centric to a customer centric orientation, new processes are required to facilitate this re-orientation. This can result in redundancy to existing staff or manufacturing processes. Company restructuring from this is a primary driver of organisational change as the old is replaced with the new.

- **End of the Product Development Life Cycle**: A product can reach the end of its product life cycle and companies are forced to cut production and operating costs or exit the market. At this stage some companies sell out or merge with existing competitors. This results in structural changes to a company’s business processes to either maintain profitability or refocus on new opportunities.

- **New Technology**: New technology can be a significant driver of organisational change. Consider the effect the internet is having on old style media and print companies. As internet access levels increase on a worldwide scale, companies are forced to adapt their existing operations to shifting consumer preferences. Companies that neglect rising trends face a diminishing market share to competitors who better understand and address the demands of their customers.

- **Mergers and Acquisitions**: When companies merge or consolidate operations, significant costs cutting and a re-engineering takes place. Redundancy and restructure to align with management objectives drives organisational change. The integration of two companies creates significant challenges to streamline operations and integrate existing IT operations into a centralized structure. Consider the implications of merging two independent billing systems which use different platforms and infrastructure. The careful dedicated planning required to bring this to fruition is part of the change management process.

Other drivers of change include the changing economic environment, customer needs and expectations, vendor capabilities, government regulations, population demographics, financial considerations, resource availability and company direction.

**Elements of change**

In today's fast pace business environment where the business landscape continually changes in response to shifting consumer preferences, new and superior production processes, and the development and introduction of disruptive technologies, companies need to have flexible and planned business practices to facilitate change to adapt to the market environment. Aligning resources and employees to a company’s goals and objectives is imperative. Whilst machines can easily adapt to a change in command, the human composition does not always provide for such an easy transition. Dealing with the human psyche, entrenched values, fears, anxieties and insecurities necessitates careful change management planning.
5 Key elements of change management are below:

- Effective communication,
- Full and active executive support,
- Employee involvement,
- Organisational planning and analysis
- Widespread perceived need for the change.

**Effective Communication**

Do not ‘sell’ change to people as a way of accelerating ‘agreement’ and implementation. ‘Selling’ change to people is not a sustainable strategy for success, unless your aim is to be ‘bitten’ at some time in the future when you least expect it. When people listen to a management high-up ‘selling’ them a change, decent, diligent folk will generally smile and appear to accede, but quietly to themselves, they’re thinking, "No chance mate, if you think I’m standing for that load of old nonsense you've another think coming…” (And that's just the amenable types - the other more recalcitrant types will be well on the way to making their own particular transition from gamekeepers to poachers.). Participation, involvement and open, early, full communication are the important factors.

Workshops are very useful processes to develop collective understanding, approaches, policies, methods, systems, ideas, etc. Staff surveys are a helpful way to repair damage and mistrust among staff - provided you allow people to complete them anonymously, and provided you publish and act on the findings. Management training, empathy and facilitative capability are priority areas - managers are crucial to the change process - they must enable and facilitate, not merely convey and implement policy from above, which does not work.

For organisational change that entails new actions, objectives and processes for a group or team of people, use workshops to achieve understanding, involvement, plans, measurable aims, actions and commitment. Encourage your management team to use workshops with their people too if they are helping you to manage the change. You should even apply these principles to very tough change, like making people redundant, closures and integrating merged or acquired organisations. Bad news needs even more careful management than routine change. Hiding behind memos and middle managers will make matters worse. Consulting with people, and helping them to understand does not weaken your position - it strengthens it. Leaders who fail to consult and involve their people in managing bad news are perceived as weak and lacking in integrity. Treat people with humanity and respect and they will reciprocate.

**Full and Active Executive Support**

For success, senior management commitment and drive for change is essential if momentum is to be maintained for effective implementation. The rest of the organisation will need to be convinced of the need and the case for change. Only this can happen to good effect if senior management, including the Chairman and Chief Executive, are collectively behind the changes sought.
Senior management must be seen to be fully supportive by what they do and say - both privately and publicly. If, however, senior management “talks the talk” by failing to back up their statements with action and a continuous commitment, progress can soon stall. Other conflicting or new priorities emerge and the momentum can be lost if senior management fail to remain fully supportive of the project. So, get senior management signed up to the change.

Change needs to be understood and managed in a way that people can cope effectively with it. Encourage your managers to communicate face-to-face with their people too if they are helping you manage an organisational change.

**Employee Involvement**

It is usually the organisation’s own employees that have the information, intuition, ideas and instincts necessary for implementing change effectively. When given the capability and the opportunity to participate in improvement programmes, it is employees who often can find the greatest cost savings and efficiency improvements.

Change management entails thoughtful planning and sensitive implementation, and above all, consultation with, and involvement of, the people affected by the changes. If you force change on people normally problems arise. Change must be realistic, achievable and measurable. These aspects are especially relevant to managing personal change.

A change in one area of the business can severely impact another. Consider the implementation of a new project management framework in a web development company. Failure to consider the requirements and dependencies of the production process can sabotage development time and create project cost blowouts. Involving team members from business units that will be affected by the change will maximize planning feedback, minimize areas of risk and improve the chances that team members will be prepared for and accept the change to the organisational process. Having the foresight to involve important personnel is a critical success factor for organisational change.

Change can be unsettling, so the manager logically needs to be a settling influence. Check that people affected by the change agree with, or at least understand, the need for change, and have a chance to decide how the change will be managed, and to be involved in the planning and implementation of the change. Use face-to-face communications to handle sensitive aspects of organisational change management.

Involving and informing people also creates opportunities for others to participate in planning and implementing the changes, which lightens your burden, spreads the organisational load, and creates a sense of ownership and familiarity among the people affected.
For change to be effective, it needs to be implemented at all levels; embedded in the culture of the organisation. To keep colleagues with you and not against you they need to be motivated and you need to understand what motivates them. You should never forget that change is a major cause of stress amongst the workforce. Staff will usually respond well to challenges (that they feel they can meet!); it’s fear of the unknown that raises stress levels. Getting staff motivated to support the changes that are to be implemented is therefore crucial for success.

Staff, their managers and senior managers are all motivated by similar things. They do not, however, necessarily place them in the same order of importance. These ‘motivators’ include pride, happiness, responsibility, recognition, security, success, and, of course, money. The trick in successfully managing change and getting the commitment and support from staff is to provide these ‘motivators’ for your staff – or at least as many of them as possible.

**Planned vs. Reactive Change**

*“The main dangers in this life are the people who want to change everything or nothing”*

- Lady Nancy Astor-

**Planned change**

This occurs when a change results from a deliberate decision to alter the organisation. A company may wish to move from one structure to another and, thus, engage in a carefully constructed or orchestrated approach to alter the structure or functions of the organisation. Planned change has three facets:

- **Incremental change**: This is change of a relatively small scope, such as making a small modification in a work procedure. It is change involving minor improvements.

- **Strategic change**: This is change of a larger scale, such as the restructuring of an organisation. In strategic change, the organisation moves from an old state to a known new state during a controlled period of time. Strategic change usually involves a series of transitional steps.

- **Transformational change**: This is the most massive scope of change. With this change, the organisation moves to a radically different, and, at times, unknown future state. In this change process, the organisation’s mission, culture, goals, structure, and leadership may all change dramatically.

**Unplanned change:**

Alterations may occur as a result of imposed conditions. Such change may be unforeseen. Unplanned changes may be environmental, for instance, natural disasters. Government regulations and economic conditions may lead to abrupt and unexpected changes for organisations. Whether forced or planned, but especially in the case of the latter, change needs to be managed, especially because it can be either disruptive or constructive.
Kotter’s Change Model

Figure 16: Kotter’s Eight Steps for Leading Change

Kotter’s 8 steps for leading change

- Create urgency
- Form a powerful coalition
- Create a vision for change
- Communicate the vision
- Remove the obstacles
- Create short-term wins
- Build on the change
- Anchor the changes in Corporate Culture

Step One: Create Urgency
For change to happen, it helps if the whole company really wants it. Develop a sense of urgency around the need for change. This may help you spark the initial motivation to get things moving. This isn’t simply a matter of showing people poor sales statistics or talking about increased competition. Open an honest and convincing dialogue about what’s happening in the marketplace and with your competition. If many people start talking about the change you propose, the urgency can build and feed on itself.

What you can do:
- Identify potential threats, and develop scenarios showing what could happen in the future.
- Examine opportunities that should be, or could be, exploited.
- Start honest discussions, and give dynamic and convincing reasons to get people talking and thinking.
- Request support from customers, outside stakeholders and industry people to strengthen your argument.

Step Two: Form a Powerful Coalition
Convince people that change is necessary. This often takes strong leadership and visible support from key people within your organisation. Managing change isn’t enough - you have to lead it. You can find effective change leaders throughout your organisation - they don’t necessarily follow the traditional company hierarchy. To lead change, you need to bring together a coalition, or team, of influential people whose power comes from a variety of sources, including job title, status, expertise, and political importance.
Once formed, your “change coalition” needs to work as a team, continuing to build urgency and momentum around the need for change.

What you can do:
- Identify the true leaders in your organisation.
- Ask for an emotional commitment from these key people.
- Work on team building within your change coalition.
- Check your team for weak areas, and ensure that you have a good mix of people from different departments and different levels within your company.

Step Three: Create a Vision for Change

When you first start thinking about change, there will probably be many great ideas and solutions floating around. Link these concepts to an overall vision that people can grasp easily and remember. A clear vision can help everyone understand why you’re asking them to do something. When people see for themselves what you’re trying to achieve, then the directives they’re given tend to make more sense.

What you can do:
- Determine the values that are central to the change.
- Develop a short summary (one or two sentences) that captures what you “see” as the future of your organisation.
- Create a strategy to execute that vision.
- Ensure that your change coalition can describe the vision in five minutes or less.
- Practice your “vision speech” often.

Step Four: Communicate the Vision

What you do with your vision after you create it will determine your success. Your message will probably have strong competition from other day-to-day communications within the company, so you need to communicate it frequently and powerfully, and embed it within everything that you do. Don’t just call special meetings to communicate your vision. Instead, talk about it every chance you get. Use the vision daily to make decisions and solve problems. When you keep it fresh on everyone’s minds, they’ll remember it and respond to it.

It’s also important to “walk the talk.” What you do is far more important - and believable - than what you say. Demonstrate the kind of behaviour that you want from others.

What you can do:
- Talk often about your change vision.
- Openly and honestly address peoples’ concerns and anxieties.
- Apply your vision to all aspects of operations - from training to performance reviews. Tie everything back to the vision.
- Lead by example.

Step Five: Remove Obstacles
If you follow these steps and reach this point in the change process, you've been talking about your vision and building buy-in from all levels of the organisation. Hopefully, your staff wants to get busy and achieve the benefits that you've been promoting.

But is anyone resisting the change? And are there processes or structures that are getting in its way? Put in place the structure for change, and continually check for barriers to it. Removing obstacles can empower the people you need to execute your vision, and it can help the change move forward.

What you can do:

- Identify, or hire, change leaders whose main roles are to deliver the change.
- Look at your organisational structure, job descriptions, and performance and compensation systems to ensure they're in line with your vision.
- Recognize and reward people for making change happen.
- Identify people who are resisting the change, and help them see what's needed.
- Take action to quickly remove barriers (human or otherwise).

**Step Six: Create Short-term Wins**

Nothing motivates more than success. Give your company a taste of victory early in the change process. Within a short time frame (this could be a month or a year, depending on the type of change), you'll want to have results that your staff can see. Without this, critics and negative thinkers might hurt your progress.

Create short-term targets - not just one long-term goal. You want each smaller target to be achievable, with little room for failure. Your change team may have to work very hard to come up with these targets, but each "win" that you produce can further motivate the entire staff.

What you can do:

- Look for sure-fire projects that you can implement without help from any strong critics of the change.
- Don't choose early targets that are expensive. You want to be able to justify the investment in each project.
- Thoroughly analyse the potential pros and cons of your targets. If you don't succeed with an early goal, it can hurt your entire change initiative.
- Reward the people who help you meet the targets.

**Step Seven: Build on the Change**

Kotter argues that many change projects fail because victory is declared too early. Real change runs deep. Quick wins are only the beginning of what needs to be done to achieve long-term change. Launching one new product using a new system is great. But if you can launch 10 products, that means the new system is working. To reach that 10th success, you need to keep looking for improvements.

Each success provides an opportunity to build on what went right and identify what you can improve.

What you can do:

- After every win, analyse what went right and what needs improving.
- Set goals to continue building on the momentum you've achieved.
- Learn about kaizen, the idea of continuous improvement.
- Keep ideas fresh by bringing in new change agents and leaders for your change coalition.

Step Eight: Anchor the Changes in Corporate Culture

Finally, to make any change stick, it should become part of the core of your organisation. Your corporate culture often determines what gets done, so the values behind your vision must show in day-to-day work. Make continuous efforts to ensure that the change is seen in every aspect of your organisation. This will help give that change a solid place in your organisation's culture. It's also important that your company's leaders continue to support the change. This includes existing staff and new leaders who are brought in. If you lose the support of these people, you might end up back where you started.

What you can do:
- Talk about progress every chance you get. Tell success stories about the change process, and repeat other stories that you hear.
- Include the change ideals and values when hiring and training new staff.
- Publicly recognize key members of your original change coalition, and make sure the rest of the staff - new and old - remembers their contributions.
- Create plans to replace key leaders of change as they move on. This will help ensure that their legacy is not lost or forgotten.

Key Points: You have to work hard to change an organisation successfully. When you plan carefully and build the proper foundation, implementing change can be much easier, and you'll improve the chances of success. If you're too impatient, and if you expect too many results too soon, your plans for change are more likely to fail. Create a sense of urgency, recruit powerful change leaders, build a vision and effectively communicate it, remove obstacles, create quick wins, and build on your momentum. If you do these things, you can help make the change part of your organisational culture. That's when you can declare a true victory. then sit back and enjoy the change that you envisioned so long ago.

Effective Communication Skills

Most experts on organisations, management and leadership, assert that effective communications is the foundation for effectiveness in any type of organisation. They assert there can't be too much communication. Some leaders misinterpret communications to be the same as paperwork or bureaucracy and so they're averse to a high degree of communications. As leaders and managers mature, they realize the need to effective convey and receive information, and efforts at communications.

People communicate using the spoken word (verbal communication) as well as through tone (the way we say it) and body language (non-verbal behaviour). Only 7% of information is transmitted via the
spoken word. 13% of information is transmitted is through tone, while the remaining 80% is transmitted via body language.

**Figure 17: The Communication Process**

Improving internal communications

Supervision is often considered to include designing the job, hiring someone to fill the job, training them, delegating to them, guiding them via performance reviews, helping them develop their career, noting performance issues, and firing them, if needed. Obviously small non-profits may not be able to afford full attention to all of these activities.

However, there are several basic and regular activities which provide a solid foundation for effective supervision. These basics ensure that everyone is working together -- as important, that staff feel they are working together -- towards a common cause.

Ironically, these basics are usually the first activities that stop when an organisation is in a crisis. Consequently, an organisation development specialist, when “diagnosing” an organisation, often first looks to see if these basics are underway.

The following activities should be conducted to ensure good communication.

- Have all employees provide weekly written status reports to their supervisors. Include what tasks were done last week, what tasks are planned next week, any pending issues and date the report. These reports may seem a tedious task, but they're precious in ensuring that employee and their supervisor have mutual understanding of what is going on, and the reports come in very handy for planning purposes. They also make otherwise harried staff and managers stand back and reflect on what they're doing.

- Hold monthly meetings with all staff together- Review the overall condition of the organisation and review recent successes. Consider conducting "in service" training where employees take turns describing their roles to the rest of the staff. For clarity, focus and morale, be sure
to use agendas and ensure follow-up minutes. Consider bringing in a client to tell their story of how the organisation helped them. These meetings go a long way toward building a feeling of teamwork among staff.

- Hold weekly or biweekly meetings with all staff together if the organisation is small (e.g. under 10 people); otherwise, with all managers together. Have these meetings even if there is not a specific problem to solve -- just make them shorter. (Holding meetings only when there are problems to solve cultivates a crisis-oriented environment where managers believe their only job is to solve problems.) Use these meetings for each person to briefly give an overview of what they are doing that week. Facilitate the meetings to support exchange of ideas and questions. Again, for clarity, focus and morale, be sure to use agendas, take minutes and ensure follow-up minutes. Have each person bring their calendar to ensure scheduling of future meetings accommodates each person's calendar.

- Have supervisors met with their direct reports in one-on-one meetings every month - This ultimately produces more efficient time management and supervision. Review overall status of work activities, hear how it's going with the supervisor and the employee, exchange feedback and questions about current programs and services, and discuss career planning, etc. Consider these meetings as interim meetings between the more formal, yearly performance review meetings.

**Getting Things Done: Practical Action Planning**

An action plan is different from most other plans in that it has built-in deliverables with deadlines. An action plan implies going beyond just planning to getting your plan done! A business action plan could help get you on the right track. It is an internal document that lists the actions you must take on a day-to-day basis while running your business to support and grow your company. The initiatives may involve customers, employees, suppliers and other stakeholders. Create a basic written action plan today to serve as a step-by-step guide for your company as you pursue business success.

Document at a high level or big picture what factors or strategies are necessary to achieve these goals and what items are risks, issues, potential delays and distractions which could side-track the team. Developing an action plan means establishing and clarifying goals. Keep in mind that these goals should be **SMART** (Specific, Measurable, Attainable, Realistic and Time-based).

Next, assign a task owner or team leader to be accountable, responsible and delegate to other team members.

Make a list of "To Do's" or action steps to check off as completed.

- Determine priorities - some steps are more important that others and should be ordered accordingly. Ask yourself "What do I have to do TODAY?"
- Collaborate by scheduling short, informal stand-up meetings, or document comments online from remote locations, to check in and review the progress or bottlenecks of the work before larger problems occur due to oversight, neglect or procrastination.
Scope out the big picture: Write a general summary of what you want to accomplish with objectives, budget, time, assumptions, definitions, potential risks and issues that may arise and tie it to a goal. Make sure you write the pros and cons so you know where to focus downstream.

**Break out the smaller tasks:** More specifically, assign tasks to yourself or a team member, pieces of the project that will support how you will achieve your goal. In this assignment make sure to think proactively about the timeline and deadlines of the overall project in terms of allocating resources.

**Create a list of action steps**
For each task, there should be a list of to-dos ranked in sequential order. Make sure this list can be changed, shared, re-ordered and deleted if there are redundancies.

**Prioritize relative importance**
Some steps are more important than others. Based on days to deadline, task and action step importance, and number of steps remaining, a master list is generated automatically to guide workflow process.

**Collaborate and translate**
Effective action plans require clear input and clarification from teammates.

An example of an action plan could look like this:
### Figure 18: An Example of an Action Plan

#### Action Plan by Quarters

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Meetings with the EDO (MS), DCO, and District Nazim. Approval from District Assembly and provincial government.</td>
<td>Q1</td>
<td>Q2</td>
<td>Q3</td>
</tr>
<tr>
<td>1 Purchase of machinery.</td>
<td></td>
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<tr>
<td>2 Education of school children and other students from college and universities for promotion of segregation at household level.</td>
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<tr>
<td>3 Weighing bridge will be installed.</td>
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<tr>
<td>4 Hospital waste carrying truck will be purchased.</td>
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<tr>
<td>Machinery will start working on segregation at household level and door to door collection in high and middle class areas.</td>
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<tr>
<td>Purchase of 2 mechanical road sweepers.</td>
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<tr>
<td>Dying and processing industry will be shifted outside the municipal limits.</td>
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<tr>
<td>Door to door collection and segregation from slum areas.</td>
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</tr>
<tr>
<td>2 mechanical road sweepers will be purchased.</td>
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<tr>
<td>PCI will be made and approved by the provincial and central government.</td>
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<tr>
<td>Establishment of vehicle repair workshop</td>
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<tr>
<td>Establishment of landfill site</td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>
REFERENCES


Selmer, Jan (1997) Differences in leadership behaviour between expatriate and local bosses as perceived by their host country national subordinates. Leadership and Organisational Development Journal, 18(1), 13-22


USEFUL LINKS

Leadership weblinks:
www.jimcollins.com (Jim Collins)
www.stephcovey.com (Stephen Covey)
www.kenblanchard.com (Ken Blanchard)
www.robinsharma.com (Robin Sharma)
www.marshallgoldsmith.com (Marshall Goldsmith)
www.tompeters.com (Tom Peters)
www.tonyrobbins.com (Anthony Robbins)
www.straightfromthegut.com (Jack Welch)
www.orrinwoodward.com (Orrin Woodward)

Management web links:
http://www.manager-tools.com/
http://www.nyu.edu/employees/hr-at-your-service/manager-s-toolkit.html
www.change-management-toolbook.com
http://www.businessballs.com/
http://www.changedesigns.co.za/