Training Manual

Introduction

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A feature of Volumes 11 and 12 of ·this series is the inclusion of OUTLINES drafted for another organisation, namely Wolsey Hall, Oxford.
These OUTLINES were written to ·supplement their Distance Learning MBA course, mounted in conjunction with Warwick University.

It is an example of the writing service offered by Brian Cawthray to any organisation wishing to supplement their own training materials with similar, organisation-specific OUTLINES.

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OUTLINES will also serve as trainees' handouts and a source of ideas for making quick overhead transparencies using a zoom photocopier and isolating and magnifying particular sections of the OUTLINES before copying them onto acetate.

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Brian Cawthray Director
Marshfield Publications Ltd.

Index

A

A.I.D.C.A 9.17
Absenteeism 11.01 ; 11.13
Abuse of Meetings 11.48
, Alcohol 11.11
, Drug 11.11
, Substance 11.11
Accounting, Role of Management 12.40
Achieving a Task 9.40
Action Planning 9.41
Activity planning 12.19
Adaptive responses 9.05
Advertisements, Understanding Job 10.07
Advertising 9:18 ; 9:31 ; 9.35
Agencies 9.35
copy 9.19
Classified 9 :18
Aggregate planning 12.26
Analysis , Force Field 9,49
, Problem 9.48
, S T P 9.48
Assets , customer based 11.33
, distribution based 11.33
, Marketing 11.33
Attitudes to learning 10.37
Attributes of Groups 11.29
, of Organisational Change 12.43
, of Organisations 12.41
Audit procedures, Sales 10.21

B

Bargaining 9.01
Barriers to Communication 11.42
Batch mgt 12.32
Behaviour, Buyer 11.38
, changing 11.45
, interpersonal 10.40
, Patterns at Meetings 11.47
Bidding 9.01
Brief, Core 12.08
Briefing, Teams 12.08
Bonus Scheme 11.23

B

Boss, Managing your	10.41
Boundary Management, Aspects of	2.11
Brainstorming	4.05
Brainstorming & Synectics	7.21
Breakdowns, equipment	5.43
Briefing 1, 2 ,3 Team	12.08-10
Buffer Stocks	5.44
Building Marketing Expertise	4.30
Building solutions	7.13; 7.22
Burns & Stalker	8.05
Business - A Systems View	4.16
Business by Telephone	5 .05-06
Business of Winning, The	2.10
Buyer & Seller, Motivating the	1.20
Buyer Behaviour, Consumer Markets and	11.38
Buyer Resistance, Overcoming	1.21
Buying	5.40

C

Capacity Investment Decisions	12.28
Career Anchors	5.26; 5.29
Career Counselling	10.01
Career Development	8.30
Career Management, Outplacement Consultants in	11.07
Career Paths for Professional Managers	5.26
Career Planning	10 .02
Case for Self-directed Learning	3.43
Centralisation	5.46
Chain of Command	5.13
Challenging the PLC Concept	4.29
Change, Management of	6 .09-6 .14
Change 1 – Opposition, Management of	6.10
Change 1, Diffusion of Innovation and	9.08
Change 2 (Techniques), Management of	6.11
Change 2, Diffusion of Innovation and	9.09
Change 3 – People Problems, Management of	6.12
Change 4 (Overall), Management of	6.13
Change, Attributes of Organisational	12.43
Change in Corporate Culture, Influencing	12.45
Change, Introducing	6.09
Change Strategies, Organisational	12.44
Change, Successfully Managing	6.14
Change to an Electronic Office, Supervising	4.26
Changing People's Minds (in Groups)	4.02

Changing People's Minds (as Individuals)	**4.01**
Changing to the Electronic Office	**4.25**
Choices & Constraints, Demands	**2.18**
Choices, Making Managerial	**3.07**
Choosing a Learning Method for Management Development	**2.16**
Classified Ads 1, Selling through	**9.18**
Classified Ads 2 - Introduction to Copy, Selling through	**9.19**
Classified Ads 3 - Structuring the Ad, Selling through	**9.20**
Classified Ads 4 - Comparing the Media, Selling through	**9.21**
Clerical Work Evaluation	**5.50**
Climate for Management Development	**3.45**
Closing a Sale	**1.24**
Co-counselling 1, 2	**11 .09-10**
Coaching	**8.11**
Colour and the Role of Market Research	**3.40**
Colour in Selling, Role of	**2.31**
Communicating -	**7.30**
Communicating Intructions	**5.11**
Communicating with the Market 3 - Inwards	**9.33**
Communicating with the Market 1, 2 - Outwards	**9.31-32**
Communication?, What is	**7.33**
Communication ~ Listening, Oral	**5.07**
Communication - Speaking, Oral	**5.08**
Communication & Motivation	**5.12**
Communication & Co-ordination within Organisations	**10.47**
Communication, Barriers to	**5.05; 5.12**
Communication, Behavioural	**5.14**
Communication, by telephone	**5 .05-06**
Communication, Defensive	**10.49**
Communication in an Organisation, Supervisory	**5.13**
Communication Strategy, Selecting a	**11.41**
Communication, styles	**5.12**
Communication, Supervisors' role in	**5.13**
	5.02-16; 5.19-25
Communications	**5.50; 7.30-34**
Communications, Conditioning Responses during Interpersonal	**11.46**
Communications, Factors Hindering Effective	**10.48**
Communications within Organisations	**10.46**
Company Structures	**5.46**
Competitive Advantage, Developing	**11.34**
Competitive Environment, Understanding the	**11.36**
Competitor Orientation, Marketing - Customer v.	**4.33**
Competitors, Watching your	**4.35**

Complaints & Grievances 6.24
Computer based Instruction - Tutor's Tasks 1.26
Computer Security 1 — Where do you Start ? 1.07
Computer Security 2 — Physical 1.08
Computer Security 3 — Systems & Applications 1.09
Computerised Systems, Implementing 4.22
Concepts, New Organisations — New 11.20
Conditioning Responses during Interpersonal Comm'ns 11.46
4.44 – 45; 6.26 – 28
Conflict 9.04-07
Conflict (Groups & Individuals), Resolving 4.45
Conflict - Discussion Paper 6.26
Conflict, Anatomy of 6.27
Conflict, Consultant's Task in Reducing 9.07
Conflict, How to Avoid 4.44
Conflict in Industrial Relations, Role of 9.06
Conflict, Interdepartmental 6.26
Conflict Management 9.04
Conflict, Stress from Decisional 3.13
Consent & Control 3.25
Constraints, Demands, Choices & 2.18
Consultancy ' 6.29 – 33
Consultancy Assignment 6.29
Consultancy Assignment — Surveying 6.32
Consultancy Assignment — Planning, Doing & Controlling 6.33
Consultancy Assignment, Stages in a 6.31
Consultancy Development 6.30
Consultancy phases 6.29; 6.31
Consultancy, role of the consultant 6.29-30
Consultancy, Surveying 6.32
Consultant, 3 Roles of a 10.38
Consultants in Career Management, Outplacement 11.07
Consultant's Task in Reducing Conflict 9.07
Consumer Markets & Buyer Behaviour 11.38
Consumer Sector 1 - Store Selling, Selling to the 9.22
Consumer Sector 2 - Direct Selling, Selling to the 9.23
Control centres 8.39
Control, Consent & 3.25
Controlling Change 6.11
Controlling work 6.20-21; 8.49
Controlling Work - Process 6.20
Controlling Work - Techniques 6.21
Controlling Work, Supervisors' Role in 8.49
Coordinating, Directing & 3.05

Coordination within Organisations, Communication & 10.47
Coping with Stress at Work 2.14
Corporate (Strategic) Planning 4.13
Corporate Decision making 6.15
Corporate History, The Value of 12.46
Corporate Planning & Decision Making 6.15
Corporate Planning, Management 8.01
Corporate Strategy 6.15
Cost Control, Finance & 6.16
Counselling 8.12
Counselling, Career 10.01
Counselling the Poor Performer 2.46
Course Director, Duties of a 10.35
Course Preparation 6 .39-40
Courses, Getting the Best out of 3.46
Creating an Advertisement 5.32
Creative thinking process, Synectics - A 7.22
Creativity 8.20
Creativity in Organisations, Encouraging 4.04
Creativity, Ways of Encouraging 3.50
Criticism, Assertiveness - Giving & Receiving 3.08
Cross-Cultural Organisational Differences 3.37
Cultural Context, Organisational Design - 12.49
Cultural Organisational Differences, Cross- 3.37
Culture, Influencing Change in orporate 12.45
Culture shock 6.09
Culture, Managing Across 3.36
Customer v Competitor Orientation, Marketing - 4.33

D

Dealing with Poor Performers 2.45
Dealing with Resistance 8.09
Decentralisation 5 .46
3.14-3.18;
Decision Making 7.13-7.25
Decision Making, Corporate Planning & 6.15
Decision Making in Groups 7.24
Decision Making, Incrementalism in 4.10
Decision Making - K.J. Method 7.23
Decision Making, People Factors in 3.17
Decision Making, Problem Solving & 7.20
Decision Making, Problem Analysis & 7.14
Decisional Conflict, Stress from 3.18

Defensive Communication 10.49
Delegation 7.41; 8.16
Delegation, A Guide to 4.07
Delivery, Shortening 4.38
Demand Measurement & Market Estimation. 12.35
Demands, Choices & Constraints 2.18
Design of Information Systems 6.17
Designing Organisations 1 4.19
Designing Organisations 2 4.20
Developing Competitive Advantage 11.34
Developing Senior Managers 10.34
Developing subordinates 8.04
Development, Career 8.30
Development, Self 8.04; 8.34
Development, Training & 6.35
Development Training for Managers 2.19
Developments in Manufacturing Systems 12.29
Diary, Recording Time - 7.48
Diffusion of Innovation & Change 1,2 9 .08-09
Direct Mail, Advertising by 5.33
Direct Selling, Selling to the Consumer Sector 2 — 9.23
Directing & Coordinating 3.05
Disaster Planning, Security Auditing & 1.10
Discipline - by Objectives 4.50
Discipline & Morale 3,23; 6.25
Discipline interviews 6.23
Discipline procedures 6.23; 6.25
Discussion Groups 6.46
Discussion, Individual & Group 6.47
Dismissal & the Law 1.35
Display, Mounting a 10.42
Distance Learning - a Company Perspective 2.22
Distance Learning - the Production Perspective 2.23
Distribution Audiit 1, 2 4.31-32
Documentary Security 1.05

E

Educating to Counter Stress 2.39
Effective Learning Materials 5.25
Effective Orders, Giving 3.06
Effective Reading 5.10
Effective Security 1.02
Effective Speaking 5.09

Effective Thinking 8.24
Electronic Office - Factors Incresing Motivation in an 4.27
Electronic Office, Supervising Change to an 4.26
Electronic Office Work 1,2 The Future of 4.23-24
Employee Involvement, Practical 7.08
Employing New Graduates 3.20
Employment Strategies 1,2, New 11 .04-05
Encouraging Creativity in Organisations 4.04
Energy, Utility & Resource Management 5.39
Enrichment, Job 8.33
Entrepreneurism 9.50
Environment, The Broader (Macro-) 11.37
Environment , The Organisational 12.50
Environment, Understanding the Competitive 11.36
Equipment usage 5.45
Essentials of M.B.O. 3.34
Ethics, New Work 11.18
Evaluating Sales Promotions, Factors in 2.27
Evaluation, Clerical Work 5.50
Evaluation, Job 8.31
Evaluation of Attitudes from Surveys 3.38
Evaluation of Training 6.48
Evaluation, Self 5.29
Executive Search (Headhunting) 11.08
Exhibition Selling 1,2,3 9.25-27
Experiential Learning (Kolb), Towards 2.24
Expert, Becoming an 2.12
Exponential smoothing 6.18

F

Facilities Layout, P.O.M. - 12.23
Factors in Evaluating Sales Promotions 2.27
Features of Project Management 5.49
Features of Super Learning (& Super Memory) 3.48
Feedback, Giving & Receiving 8.21
Finance & Cost Control 6.16
Financial Objectives, Project Management 2 - 6.07
Financial Rewards, Remuneration & 4.43
Fineman 7.05
Fixing the Price 3.39
Flexible Dayworking Patterns 11.03
Flexiplace), Homeworking (Tele-working or 11.02
Followership 3.24

Force field 8.19
Force Field Analysis, Problem Solving using 9.49
Forecasting 6.18
Forecasting Future Demand 12 .36
Forecasting, Sales 10.20
Franchise, Setting up a 5.35
Franchising 5.34 - 35
Functions of a Manager 4.11

F

Getting Results from Advertising Copy 3.41
Getting Results from People 3.01
Getting the best out of Courses 3.46
Getting Things Done 8.17; 8.35
Getting Your Own Way (Interpersonal Influencing) 3.02
Giving & Receiving Criticism, Assertiveness - 3.08
Giving & Receiving Feedback 8.21
Giving Effective Orders 3.06
Giving Recognition 11.25
Goldthorpe 7.05
Graduates, Employing New 3.20
Grievance interviews 8.50
Grievance procedures 6.23
Grievances, Complaints & 6.24
Group analysis (problem solving) 7.06
Group Behaviour 7.26 - 27
Group Behaviour - Objectives Sheet 7.27
Group conflict 6.26
Group Decision Making 7.24
Group Discussion 6.46 - 47
Group Discussion, Individual & 6.47
Group fears 7.27 - 28
Group Morale 4.41
Group Motivation 7.06
Group Norms 7.27 - 28
Group Problem-Solving 7.17
Group Values, Managing People - 11.28
Groups & Individuals, Resolving Conflict between 4.45
Groups 1,2, Attributes of 11.29-30
Groups, Discussion 6.46
Groups, Managing 7.29
Groups), Changing People's Minds (in 4.02
Groups), Management & Motivation of People 2 (7.06

H

Handouts, Using Training Outlines & 10.44
Headhunting) Executive Search (11.08
Health & Safety in the Electronic Office 4.28
Health, Managerial Responsibilities & 11.16
Health, Safety & 5.47
Helping Relationship, The 10.06
Herzberg 7.05; 7.08; 7.11
History, The Value of Corporate 12.46
Homeworking (Tele-working or Flexiplace) 11.02
How Packaging Communicates 1.17
How People Learn 6.49
How the Company can Alleviate Stress 2.40
How to Avoid Conflict 4.44

I

I.T. for Organisations, Implications of 4.21
Iceberg model 7.16; 7.25
Ideas, New Managers - New 11.19
Identifying Learning Needs 3.42
Image Management in Service Organisations 10.13
Implementing Computerised Systems 4.22
Implications of I.T. for Organisations 4.21
Improving Company Training Potential 2.49
Improving Employee Participation 11.27
Improving Interactive Skills 1.37
Improving Public Relations 5.48
Improving the Effectiveness of Lectures 5.23
Incentives, Non-Financial 7.10
Increasing Work Rewards 11.22
Incrementalism in Decision Making 4.10
Individual & Group Discussions 6.47
Induction to Jobs, Introduction & 3.19
Industrial & Organisational Markets 1,2 11.39 - 40
Industrial Market, Selling to the 10.30
Industrial Market 1,2, The 10 .28 - 29
Industrial Negotiation 9.03
Industrial Negotiations 1.34
Industrial Relations, Role of Conflict in 9.06
Industrial Relations, Security & 1.06
Industrial Relationships 6 .23 - 28
Influencing people 8.17 - 19

Influencing (2 models of) 4.03
Influencing Change in Corporate Culture 12.45
Influencing of Minds, The 11.45
Influencing Styles 1,2 (To get results) 8.18 - 19
Influencing), Getting Your Own Way (Interpersonal 3.02
Informal Groups in Organisations 7.29
Information Systems, Design of 6.17
Information Systems, Marketing 12.33
Innovation & Change 1, 2, Diffusion of 9 .08 - 09
Innovation & Growth in Service Industries 10.10
Instructions, Communicating 5.11
Interactive Skills 1.37 - 39
Interactive Skills, Improving 1.38
Interactive Skills, Using 1.39
Interdepartmental Conflict 6.26
Intergroup conflict 6.26
Internal Policing - Security 1.03
International Managers, Preparation of 3.35
International Sales Managers, Selling Overseas - 9.36
Interpersonal Communications, Conditioning Responses during 11.46
Interpersonal Skills - Confronting & Supporting 10.50
Interpersonal Skills Training 10.40
Interruptions 7.41
Interview 1, 2, The Selling 9.16 ~ 17
Interview Procedures, Recruitment 2.44
Interview Skills 5 .02 - 03
Interviewing & Adressing People 5.02
Interviewing, Appraisal 8.14
5 .01 - 04; 6.24
Interviews 8.12 - 15
Interviews, Questioning at 5.04
Introducing Change 6.09
Introducing M.B.O. 3.33
Introduction & Induction to Jobs 3.13
Inventories 5.45
Inventory Control 12.31
Inventory Management 12.30
Investment Decisions, Capacity 12.28
Investment , Product/Service Planning & 12.18
Involvement, Practical Employee 7.08

J

Job Accomplishments 1.49

Job Advertisements, Understanding **10.07**
Job Enrichment **8.33**
Job Evaluation **8.31**
Job Management Development. On the **3.44**
Job Modelling **1.46**
Job, On Changing your **3.49**
Job Satisfaction **8.32**
Job Sharing **11.01**
Jobs, Induction & Introduction to **3.19**
Just-in-time (JIT) **12.29 - 31**

K

K.I.T.A. **7.02**
Keyword diagrams **5.16**
Knowledge as a Motivator **11.26**
Kolb's learning model **6.49**

L

Law, Dismissal & the **1.35**
Leader, Manager as a **8.04**
Leader, The Supervisor as a **8.45**
Leadership - What's the Answer ? **4.08**
Leadership 1,2, Situational **12.06 - 07**
Leadership 1,2 **12.12 - 13**
Leadership, project **5.49**
Leadership, Theories **8.45**
Learning **1.25; 2.20-25; 5.19-25; 6.49; 10.36-37**
Learning (& Super Memory), Features of Super- **3.48**
Learning about the Organisation **11.17**
Learning, Action - Operating Features **5.42**
Learning, Encouraging —- 1,2, **10.36 - 37**
Learning Materials, Effective **5.25**
Learning Method for Management Development, Choosing a **2.16**
Learning Needs, Identifying **3.42**
Learning Styles (Investigating) 1,2, **2.20 - 21**
Learning Technology, Aspects of **5.19**
Learning, The Character of Action **3.47**
Learning Procedure, Training Design Algorithm 4 **6.44**
Lectures, Improving the Effectiveness of **5.23**
Legislative Outlines for Line Managers **3.10**
Letter Writing **7.37**

Life Investments of Professional Managers 5.27
Life Objectives, Setting 8.35
Line Managers, Legislative Outlines for 3.10
Line-Staff Relationships 9.13
5.05 - 08; 5.12
Listening 7.30; 7.36
Listening, Oral Communications - 5.07
Looking at Distance Learning - Preparation Perspective 2.23
Looking at Distance Learning - a Company Perspective 2.22
Looking to Save Time 1, 2 12.14 - 15

M

M.B.O., Introducing 3.33
M.B.O., Essentials of 3.34
McGregor 8.05
Machines, Office 8.41
Macro-environment, The Broader 11.37
Maintaining Discipline & Morale 6.25
Maintenance Management 5.43
Maintenance planning 5.43
Making a Presentation (Preparations) 5.21
Making a Presentation (Considerations) 5.22
Making Managerial Choices 3.07
Management 8.01 - 02
Management?, What is 8.02
Management ,(Corporate) Planning 8.01
Management & Motivation of People 2 (Groups) 7.06
Management & Motivation of People 1 (Individuals) 7.05
Management & Motivation of People 3 (in Organisations) 7.07
Management & Supervisory Training, Questions on 6.38
Management Accounting, The Role of 12.40
Management Development & Implications on Managerial Choice 1, 2 2.14 - 15
Management Development, Choosing a Learning Method for 2.16
Management Development , The Climate for 3.45
Management Development through Mentoring 1,2 12 .03 - 04
Management, Energy & Utility 5.39
Management, Management Maintenance 5.43
Management, Materials 5.42
Management of Change 4 (Overall) 6.13
Management of Change 3 (People Problems) 6.12
Management of Change 2 (Techniques) 6.11
Management of Change 1 - Opposition 6.10

Management, Personnel - Fields of Activity 1.40
Management of Time, Effective 7.49
Management of Time 7.42
Management of Time, Departmental 7.46
Management of Time, Diaries 7.48
Management of Time (Personal) 7.39
Management of Time, personal 7.39; 7.41; 7.43
Management, Some Theories of 4.09
Management, Stock 5.44
Management, Store 5.41
Management Structures 1,2, Anatomy of 9.14 - 15
Management style 7.07; 8.05-06
Management Style 2 - Blake & Reddin 8.06
Management, Theories of 8.03
Management Training for First Line Sales Managers 9.37
Manager a Leader 8.04
Manager, Functions of a 4.11
Manager, Role of the 8.08
Manager's 4 Roles, The 1.33
Manager's role 8.04; 8.08; 8.40
Managerial Choice 1,2, Management Development & Implications on 2.14 - 15
Managerial Choices, Making 3.07
Managerial Effectiveness, Towards Developing 2.13
Managerial Incentives 4.42
Managerial Responsibilities & Health 11.16
Managerial Skills 8 .08 - 8.25
Managerial Strengths & Weaknesses 8.07
Managerial Stress 5.30
Managerial Style I 8.05
Managers - New Ideas, New 11.19
Managers, Career Paths of Professional 5.26
Managers, Legislative Outlines for Line 3.10
Managers, Life Investments of Professional 5.27
Managers, Preparation of International 3.35
Managing Across Cultures 3.36
Managing Change Successfully 6.14
Managing for Good Performance 12.22
Managing for Wellness 1,2 11.14 - 15
Managing Groups 9.38
Managing People - Group Values 11.28
Managing People, Perception & 12.02
Managing Projects 12.19
Managing the High Performer 3.21

Managing your Boss 10.41
Managing your Time 7.43
Manpower Planning 8.26
Manufacturing Systems, Development in 12.29
Mapping your Motivation Patterns 1,2 3.31 - 32
Market 1,2 - Outwards, Communicating with the 9.31 - 32
Market 3, - Inwards, Communicating with the 9.33
Market Estimation, Demand Measurement & 12.35
Market Planning, Strategic 11.32
Market Research, Colour & the Role of 3.40
Market Research in Packaging Design, Role of 1.18
Market Share & Segmentation 12.37
Market Targeting 12.38
Marketing - Customer v Competitor Orientation 4.33
Marketing Assets, Understanding 11.33
Marketing Audit 1.12
Marketing Expertise, Building 4.30
Marketing, Franchising 4.34 - 35
Marketing Information Systems 12.33
Marketing Planning 1.11
Marketing Research 12.34
Marketing Roles, Differences between Sales & 10.15
Marketing, Self 5.28
Marketing, Sponsorship 5 .36
Marketing, Surveys 5.37
Marketing, The Nature of 11.31
Markets & Buyer Behaviour, Consumer 11.38
Markets 1,2, Industrial & Organisational 11.39 - 40
Maslow 7.05; 7.11
Materials Management 5.42
Meeting's Chairman, The Role of the 11.50
Meetings 7.34 - 35; 11.47 - 50
Meetings - Organisation of 7.34
Meetings 1,2, Use & Abuse of 11.48 - 49
Meetings, Behaviour Patterns at 11.47
Memorising 7.32
Mentoring 1,2 Management Development through 12 .03 - 04
Mind Levels, The Deeper 11.44
Minds, The Influencing of 11.45
Minds, The Meeting of 11.43
Mismanagement 8.36
Modelling an Effective Organisation 4.18
Morale, Discipline and 3.23
Morale, Group 4.41

Morale, Maintaining Discipline & 6.25
More Problem Solving Considerations 3.15
Motivating Employees 7.03
Motivating Groups 7.06
Motivating in Organisations 7.07
Motivating Individuals 7.05
Motivating Sales Personnel 1,2 9.29 - 30
Motivating the Buyer & Seller 1.20
7.01 - 7.12; 5.10; 5.12
Motivation 5.26
Motivation & Pay 7.09
Motivation by Setting Objectives 7.01
Motivation, Communication & 5.12
Motivation of People 2 (in Groups), Management & 7.06
Motivation of People 1 (Individuals), Management & 7.05
Motivation of People 3 (In Org'ns), Management of 7.07
Motivation of People at Work 7.02
Motivation, office 8.40
Motivation, Pay Systems & 7.09
Motivation, Principles of 12.05
Motivation, Self 7.11
Motivation Theory 7.04 - 05; 7.12
Motivation Theory & its Problems 7.12
Motivation Theory & Man 7.04
Motivation to read 5.10
Motivational Patterns 1,2 , Mapping your 3.31 - 32
Motivator, Knowledge as a 11.26
Moving Average 6.18

N

Needs, Meeting an Individual's 9.39
Needs of people 8.33
Needs Satisfaction in Organisations, Reward Systems & 10.39
Negative Feelings, Assertiveness - Handling 3.09
Negotiating, Aspects of 2.38
Negotiating, Basics of 2.37
Negotiating towards Agreement 9.01
Negotiating towards Independent Advantage 9.02
Negotiation, Industrial 9.03
New Employment Strategies 1,2 11.04 - 05
New Managers - New Ideas 11.19
New Organisations - New Concepts 11.20
New Technology - Stsyems Analysis 5.38

New Technology in Service Industries 10.09
New Work Ethics 11.18
Non-Financial Incentives 7.10
Norms , Group 7.28

O

O & D 6.09
O & M, Project Management 6.01 - 08
O & M training 6.36
O & M Project, Stages in an 6.01
Objectives - Planning, Setting 7.44
Objectives 1,2,3, Writing Training 1.27
Objectives, advertising 5.32
Objectives, consultancy 6.31
Objectives, course 6.40
Objectives, maintenance 5.43
Objectives, Motivation by Setting 7.01
Objectives fo stock control 5.44
Objectives of systems analysis 5.38
Objectives, Problem Solving - by 4.06
Objectives, Project Management 1, Planning 6.06
Objectives, purchasing 5.40
Objectives, Selection by 4.49
Objectives, Setting, Time 7.45
Objectives, speaking 5.09
Observation Sheet, Group Behaviour — 7.27
Office Machines 8.41
Office Management 8.39 - 44
Office Manager, Role of the 8.40
Office Supervision 1 - Functions of the Office 8.42
Office Supervision 2 - Increasing Productivity 8.43
Office Supervision 3 - Office Systems 8.44
Office work 8.10
On Changing your Job 3.49
On the Job Management Development 3.44
Onion model 7.16; 7.25
Operations Control, Production/ 12.27
Operations Management, Role of Production/ 12.17
Oral Communication - Listening 5.07
Oral Communication — Speaking 5.08
Orders, Giving Effective 3.06
Organisation, Learning about the 11.17
Organisation & the Supervisor 8.46

Organisation Design — Cultural Context 12.49
Organisation, Modelling an Effective 4.18
Organisation principles 8.46
Organisation, Roles in 4.12
Organisation, types of 8.05
Organisation weaknesses 8.46
Organisational Behaviour, Perception & 9.10
Organisational Change, Attributes of 12.43
Organisational Change Strategies 12.44
Organisational Differences, Cross-Cultural 3.37
Organisational Environment, The 12.50
Organisations - New Concepts, New 11.20
Organisations - Power & the Political Context 12.42
Organisations & the Supervisor 8.46
Organisations 1,2, Designing 4.19 - 20
Organisations, Attributes of 12.41
Organisations, Authority in 1.36
Organisations, Groups in 7.29
Organisations, Political Language in 3.29
Organisations, Power in 3.27
Organisations, Symbolic Action in 3.30
Organising your Study Time 1.30
Origins of Power 3.20
Outline papers and Summaries, Writing 10.45
Outplacement consultants in Career Management 11.07
Overcoming Buyer Resistance 1.21
Overhead Projector, Using an 10.43

P

Packaging (Materials & Requirements) 1.15
Packaging Communicates, How 1.17
Packaging Design, Role of Market Research in 1.18
Packaging, Procedure for Deciding on the 1.16
Packaging to Sell 1,2 1.13 - 14
Pareto Principle 6.19
Passive behaviour 8.23
Pay Systems & Motivation 7.09
People & Production/Operations Management 11.21
People Factors in Decision Making 3.17
People Learn, How 6.49
People, management of 8 .01 - 02
People, needs 6.13; 6.40; 8.08
People, problems 6.11 - 12; 6.21

People, The Value of 3.22
People's wants 7.02
Perception & Managing People 12.02
Perception & Organisational Behaviour 9.10
Performance Aids 1.43
Performance Appraisal 8.15
Performance Engineering 1,2, The Case for 2.47 - 48
Performance Management 1.45
Performance, Managing for Good 12.22
Performance Problems, Solving 1.41
Performance Pyramids 1.47
Performance Related Rewards, Remuneration & 11.23
Performance Situation Appraisal 1.44
Performance Systems 1.42
Performance, Training for 1.48
Performer, Counselling the Poor 2.46
Performer, Managing the High 3.21
Personality as a System, Your 2.03
Personality Sub-systems and Transactions 2.04
Personnel - Fields of Activity, Management of 1.40
Personnel Records 8.29
Personnel Security 1.04
Phenomenology 7.05
Plan, 7-point, interviewing 5 .02 - 03
6.15 - 21; 8.01; 8.08
Planning 3.04
Planning & Controlling Work 6.20 - 21
Planning & Controlling Time 7.40
Planning & Forecasting 6.18
Planning & Investment, Product/Service 12.18
Planning 1,2, Strategic Thinking & 12.47 - 48
Planning 1,2, Strategic 4.14 - 15
Planning a Promotion 2.28
Planning a talk 5.09
Planning, Action 9.41
Planning, Career 10.02
Planning change 6.09; 6.13 - 14
Planning Coonsultancy 6.23
Planning, Corporate 6.15 - 16
Planning, Corporate (Strategic) 4.13
Planning. Information Systems 6.17
Planning, Manpower/staff 8.26 - 27
Planning Objectives, Project Management 1 6.06
Planning, Pareto Principle 6.19

Planning, Project	6.02
Planning, Setting Objectives -	7.44
Planning, Strategic Market	11.32
Planning to think	5.17 - 18
Plant Replacement	5.43
PLC Concept, Challenging the	4.29
Policing, Internal	1.03
Political Context, Organisations - Power & the	12.42
Political Language in Organisations	3.29
Production/Operations Management	12.23 - 32
POM - Facilities Layout	12.23
Poor Performer, Counselling the	2.46
Pope	7.05
Power	3.26
Power & the Political Context, Organisations -	12.42
Power in groups	7.29
Power in Organisations	3.27
Power, Origins of	3.28
Practical Employee Involvement	7.08
Practices to Reduce Stress	2.43
Prejudice & Managing People	12.01
Preparation of International Managers	3.35
Presentation (Preparations), Making a	5.21
Presentation (Considerations), Making a	5.22
Price, Fixing the	3.39
Price, Is it Right ?	9.28
Pricing a Service	10.12
Principles of Motivation	12.05
Principles of Production/Operations Planning	12.26
Principles of Supervision	8.47
Priorities, Self Management - Setting	7.50
Priority agenda	7.46
Problem Analysis	7.13 - 21
Problem Analysis & Decision Making	7.14
Problem Analysis, S.T.P. Model of	9.47
Problem Identification	7.15 - 17; 7.22 - 25
Problem ownership	7.13; 7.25
Problem Solving	3.14; 7.13 - 25
Problem Solving - by Objectives	4.06
Problem Solving & Decision Making	7.20
Problem Solving Considerations, More	3.15
Problem Solving Process	7.18
Problem Solving using Force Field Analysis	9.49
Problem-Solving, Group	7.17

Procedure for Deciding on the Packaging 1.16
Procedures, discipline 6.23; 6.25
Procedures, grievance 6.23
Procedures, learning 6.44
Process Choice 12.21
Process, Controlling Work — 6.20
Product & Service Positioning 12.39
Product Differentiation, Achieving 11.35
Product/Service Planning & Investment 12.18
Production Control 4.36
Production Control, Simulation in 4.39
Production Planning Stages 4.37
Production/Operations Control 12.27
Production/Operations Management 12.16
Production/Operations Management, People & 11.21
Production/Operations Management, Role of 12.17
Production/Operations Planning, Principles of 11.26
Productivity 12.20
Productivity, Office Supervision 2, Increasing 8.43
Productivity, Sales Effectiveness & 10.25
Professional managers 5.26 - 27
Project Appraisal 6.05
Project Evaluation 6.04
Project, Financial Objectives 6.07
Project leadership 5.49
5.38; 5.49;
Project management 6 .01 - 08
Project Management 1 - Planning Objectives 6.06
Project Management 2 - Financial Objectives 6.07
Project Management 3 - People needs 6.08
Project Management, Feature of 5.49
Project Management O & M 6.03
Project Planning 6.02
Project Stages 6.01
Projects, Managing 12.19
Public Relations 1 6.22
Public Relations 2 5.48
Purchasing & Storekeeping 5.40
Push-pull style 8.19

Q

Quality Assurance 12.32
Quality Audits 3.12 - 13

Quality Considerations in Service Industries 10.14
Quality Control 4.40
Quality Managers, Identifying - 1,2 9.43 - 44
Quality, The Pursuit of 3.11
Questioning at Interviews 5.04
Questions, Asking the Right 3.03
Questions on Management & Supervisory Training 6.38
Questions on Training 6.38

R

Reading 7.31
Reading, Efficient 5.10
Reading Faster 7.31
Recalling 7.32
Recognition, Giving 11.25
Recording Time 7.47
Recording Time - Diary 7.48
Records, Personnel 8.29
Recruitment & Selection, Stages in 5.01
Recruitment Advertising 1.31
Recruitment Interview Procedures 2.44
Reddin, Management Style 2 - Blake & 8.06
Redeployment, Redundancy & 10.05
Redundancy 1,2 10.03 - 04
Redundancy & Redeployment 10.05
Reflex Development 6.43
Public Relations 1, 2 5.48; 6.22
Relationships, Line-Staff 9.13
Remuneration (for hourly paid) 11.24
Remuneration & Financial Rewards 4.43
Remuneration & Performance Related Rewards 11.23
Reordering 5 44
Report Writing 7.38
Research, Marketing 12.34
Resistance, Dealing with 8.09
Resolving Conflict (Groups & Individuals) 4.45
Resource Management 8.01 - 02; 8.08
Resource Management, Energy, Utility & 5.39
Results - Getting Things Done 8.17
Results from People, Getting 3.01
results), Influencing Styles 1 - (to get 8.18
Rewards Systems & Needs Satisfaction in Organisations 10.39
Rewards, Increasing Work 11.22

Rewards, Remuneration & Performance Related 11.23
Rewards, Remuneration & Financial 4.43
Role Concepts for Managers 12.11
Role Conflict & Adaptive Responses 9.05
Role of Colour in Selling 2.13
Role Conflict in Industrial Relations 9.06
Role of Market Research in Packaging Design 1.18
Role of Production/Operations Management 12.17
Role of the Supervisor 8.49
Role of the Office Manager 8.40
Role of the Manager 8.03 - 04; 8.08
Roles in Groups 7.29
Roles in Organisations 4.12
Running a Training Section 6.36

S

S.L.P.'s, Sales Promotion Techniques 2.30
S.T.P. Model of Problem Solving 9.48
Safety & Health 5.47
Sale, Closing a 1.24
Sales & Marketing Roles, Differences between 10.15
Sales Auditing 10.21
Sales Campaign 1,2, Developing a 10.22 - 23
Sales Effectiveness & Productivity 10.25
Sales Effectiveness, Managing 10.24
Sales Force, Sales Organisation 1 - Structuring the 10.16
Sales Forecasting 10.20
Sales Management & Tele-Marketing, Telephone in 9.34
Sales Manager, Characteristics of an Effective 10.26
Sales Manager, The Successful 10.27
Sales Managers, Management Training for First Line 9.37
Sales Managers, Selling Overseas - International 9.36
Sales Organisation 1 — Structuring the Sales Force 10.16
Sales Organisation 2 - Alternative Structures 10.17
Sales Organisation 3 - Making the Organisation Work 10.18
Sales Personnel 1, 2, Motivating 9.29 - 30
Sales Promotion 2.29
Sales Promotion Techniques (S.L.P.'s) 2.30
Sales Promotions, Factors in Evaluating 2.27
Salespersons, Improving the Performance of Average 10.19
Satisfaction, Job 8.32
Satisficing 5.38
Secretary, Working with your 8.10

Security - Management Under Seige	1.01
Security & Industrial Relations	1.06
Security 1 - Where do You Start ?, Computer	1.07
Security 2 - Physical, Computer	1.08
Security 3 - Systems & Applications, Computer	1.09
Security Auditing & Disaster Planning	1.10
Security, Documentary	1.05
Security, Effective	1.02
Security, Personnel	1.04
Segmentation, Market Share &	2.26
Selecting a Communication Strategy	11.41
Selection by Objectives	4.49
Selection, Stages in Recruitment &	5.01
Self development	5.26 - 27; 8.34
Self Evaluation	3. 29
Self Management	7.50; 8.36 - 37
Self Management - Setting Priorities	7.50
Self Management 1 (Attitude of Mind)	8.36
Self Management 2	8.37
Self Marketing	5.28
Self Motivation	7.11
Self-Directed Learning, The Case for	3.43
Sell 1,2, Packaging to	1.13 - 14
Seller, Motivating the Buyer &	1.20
Selling 1,2,3, Exhibition	9.25 - 27
Selling a Service, Aspects of	10.08
Selling by Telephone	5.05
Selling Goods (or Services) for Profit	9.24
Selling Interview 1,2	9.16-17
Selling Overseas - International Sales Managers	9.36
Selling, Role of Colour in	2.13
Selling Technique, Sharpening Your	1.19
Selling through Classified Ads 4 - Comparing the Media	9.21
Selling through Classified Ads 3 - Structuring the Ad	9.20
Selling through Classified Ads 2 - Introduction to Copy	9.19
Selling through Classified Ads 1	9.18
Selling to Senior Management	1.23
Selling to the Consumer Sector 2 - Direct Selling	9.23
Selling to the Consumer Sector 1 — Store Selling	9.22
Selling, Top Tier	1.22
Senior Managers 1,2, Team Building for	2.06 - 07
Senior Managers, Developing	10.34
Service, Aspects of Selling a	10.08
Service Industries, Innovation & Growth in	10.10

Service Industries, New Technology in	10.09
Service Industries, Quality Considerations in	10.14
Service Industries, Reproducing	10.11
Service Industries, Image Management in	10.13
Service Planning & Investment, Product/	12.18
Service Positioning, Product &	12.39
Service, Pricing a	10.12
Servicing equipment	5.43
Setting Life Objectives	8.35
Setting Objectives - Planning	7.44
Setting Priorities	7.40
Setting Time Objectives	7.45
Setting up a Franchise	5.35
Sharpening your Selling Technique	1.19
Shortening Delivery	4.38
Simulation in Production Control	4.39
Situation Appraisal, Performance	1.44
Situational Leadership 1, 2	12 .06 - 07
Skill Training & Analysis	4.47
Solving Performance Problems	1.41
Speaking, Effective	5.09
Speaking, Oral Communication -	5.08
Special Groups, Supervising	8.48
Spider Diagrams	5.16
Sponsorship	5.36
SQ3R	5.10
Staff Function 1, 2, The	9.11 - 12
Staff Planning	8.26 - 28
Staff Planning & Development	6.38
Staff Planning, O & D	8.27
Staff-Line Relationships	9.13
Staffing	8.28
Stages in an O & M Project	6.01
Stages in a Consultancy Assignment	6.31
Stages in Recruitment & Selection	5.01
Stock Control	5.44
Store Selling, Selling to the Consumer Sector 1 -	9.22
Storekeeping, Purchasing &	5.40
Stores Management	5.41
Strategic Market Planning	11.32
Strategic Planning - Corporate	4.13
Strategic Planning 1,2	4.14 - 15
Strategic Thinking & Planning 1,2	12.47 - 48
Strengths & Weaknesses, Managerial	8.07

Stress & Women Managers 2.41
Stress at Work, Coping with 2.42
Stress, Educating to Counter 2.39
Stress from Decisional Conflict 3.18
Stress, How the Company can Alleviate 2.40
Stress, Managerial 5.30
Stress, Practices to Reduce 2.43
Structure of a Training Session 6.45
Structures 1,2, Anatomy of Management 9.14 - 15
Structures, Company 5.46
Study Time, Organising your 1.30
Subcontracting 11.06
Subordinates, development of 8.04
Subordinates, Talking with 2.05
Substance Abuse - Impaired Performance 11.13
Substance Abuse 1,2, A Management Approach to 11.11-12
Super-Learning, Features of 3.48
Super-Memory, Features of 3.48
Supervising Change to an Electronic Office 4.26
Supervising Special Groups 8.48
Supervision (Human Relations), Behaviour in 8.50
Supervision 1, (Functions of the Office), Office 8.42
Supervision 2, (Increasing Productivity), Office 8.43
Supervision 3, (Office Systems), Office 8.44
Supervision, Principles of 8 .47 - 48
Supervisor as a Leader, The 8.45
Supervisor, Organisations & the 8.46
Supervisor's role 5.13; 5.42
Supervisor's role in training 6.35
Supervisor's Role in Controlling Work 8.49
Supervisors, Communication in an Organisation - 5.13
Supervisor's duties 8.47; 8.50
Supervisory Training, Behaviour Models for 2.25
Supporting, Interpersonal Skills - Confronting & 6.38
Surveys 5.37
Surveys, consultancy 6.31 - 32
Surveys, Evaluating Attitudes from 3.38
Symbolic Action in Organisations 3.30
Synectics - A Creative Thinking Process 7.22
Synectics, Brainstorming & 7.21
Systems Analysis 5.38
Systems Theory - What Use is it ? 4.17

T

T.A. - Transactional Analysis **8.22**
Taking Action **7.19**
Talking with Subordinates **2.05**
Tannenbaum & Schmidt **8.05**
Target setting **8.13; 3.35**
Target Setting & Appraisal **8.13**
Task, Achieving a **9.40**
Teaching Preparation **6.50**
Team Briefing 1,2,3 **12.08 - 10**
Team Building 1,2, Another View of **2.08-09**
Team Building Effectively **9.46**
Team Building for Senior Managers 1,2 **2.06-07**
More thoughts on team building **9.47**
Teams, Building Effective **9.45**
Techniques, Controlling Work - **6.21**
Technology, Aspects of Learning **5.19**
Technology, new (Systems Analysis) **5.38**
Tele-Marketing, Telephone in Sales Management & **9.34**
Tele-working or Flexiplace), Homeworking (**11.02**
Telephone, Business by **5.05**
Telephone for Business, Using the **5.06**
Telephone in Sales Management & Tele-Marketing **9.34**
Telephone, Using the **5.06**
The Anatomy of Conflict **6.27**
The Broader (Macro-) Environment **11.37**
The Case for Performance Engineering **2.47 - 48**
Theories of Management _ **8.03**
Thinking **5.17**
Thinking & Planning 1,2, Strategic **12.47-48**
Thinking, Better **5.18**
Thinking, Creative **8.20**
Thinking, Effective **8.24**
Thinking Process, Synectics - A Creative **7.22**
Time (Personal), Management of **7.39**
Time - Departmental, Management of **7.46**
Time 1, 2, Looking to Save **12.14 - 15**
Time Effectively, Using **7.49**
Time Management - Using time better **7.41**
Time, Management of Departmental **7.46**
Time, Management of **7.42**
Time, Managing your **7-43**
Time Objectives, Setting **7.45**

Time, organising 7.47
Time, Organising your Study 1.30
Time, Planning & Controlling 7.40
Time Standards 7.47
Top Tier Selling 1.22
Towards Developing Managerial Effectiveness 2.13
Towards Experiential Learning (Kolb) 2.24
Training 6 .43 - 50
Training - methods & materials 4.47
Training & Development 6.35
Training & Improving Performance, Alternatives to 2.50
Training 1,2, A Model for Assertion 2.01 - 02
Training Aids 4.48
Training Costs, Reducing 10.33
Training Design Algorithms 1,2,3,4 6.41 - 44
Training Design within Organisations 10.31
Training, evaluation of 6.48
Training for First Line Sales Managers, Management 9.37
Training for Performance 1.48
Training, Interpersonal Skills 10.40
Training, Management & Supervisory 6.38
Training motivation 6.34
Training Needs & Meeting Them 6.37
Training Objectives 1,2,3, Writing 1.27 - 29
Training Outlines & Handouts, Using 10.44
Training Philosophy, A 4.46
Training Potential, Improving Company 2.49
Training, Questions on Management & Supervisory 6.38
Training Resource Needs, Reviewing the Organisation's 10.32
Training Section, Running a 6.36
Training, Structuring Sessions 6.45
Transactional analysis 8.18; 8.22
Transactional Analysis 8.22
Transactions, Personality Sub-systems & 2.04

U

Understanding Marketing Assets 11.33
Understanding the Competitive Environment 11.36
Union expectations 7.12
Use & Abuse of Meetings 1,2 11.48 - 49
Using Equipment & Facilities 5.45
Using Interactive Skills 1.39
Using the Telephone for Business 5.06

Using Time Effectively 7.49
Utility & Resource Management, Energy 5.39

V

Value Analysis 1.50
Value of People, The 3.22
Values, Managing People - Group 11.28
Visual Materials in Instruction 5.20
Vroom 7.05; 7.08

W

Warehousing 5.41
Wasted time 7.43
Watching your Competitors 4.35
Ways of Encouraging Creativity 3.50
Ways of resisting 8.09
Weaknesses, Managerial Strengths 8.07
Wellness 1,2, Managing for 11.14 - 15
What is Communication ? 7.33
What is Management ? 8.02
Winning, The Business of 2.10
Women Managers, Stress & 2.42
Work 1, 2, The Study of 12.24 - 25
Work Study 7.46
Work, Supervisors Controlling 8.49
Working through an Advertising Agency 9.35
Working with your Secretary 8.10
Writing Advertising Copy 1, 2 ,3 2.34
Writing, Letter 7.37
Writing, Outline Papers & Summaries 10.45
Writing, Report 7.38
Writing Training Objectives 1, 2, 3 1.27

Y

Your Personality as a System 2.03

Z

Zero Defect Programme, Justifying a 9.42

Contents

PART 1 SECURITY

Security - Management under Siege	1.01
Effective Security	1.02
Internal Policing	1.03
Personnel Security	1.04
Documentary Security	1.05
Security & Industrial Relations	1.06
Computer Security 1 - Where do you start	1.07
Computer Security 2 - Physical	1.08
Computer Security 3 - Systems & Applications	1.09
Security Auditing & Disaster Planning	1.10

PART 2 MARKETING & RELATED ASPECTS

Marketing Planning	1.11
Marketing Audit	1.12
Packaging to Sell - 1	1.13
Packaging to Sell - 2	1.14
Packaging - Materials & Requirements	1.15
Deciding on the Package	1.16
How Packaging Communicates	1.17
Role of Market Research in Packaging Design	1.18
Sharpening your Selling Technique	1.19
Motivating the Buyer & Seller	1.20
Overcoming Buyer Resistance	1.21
Top-tier Selling	1.22
Selling to Senior Management	1.23
Closing the sale	1.24

PART 3 TRAINING & LEARNING

Learning	1.25
Computer-based Learning - Tutor tasks	1.26
Writing Training Objectives - 1	1.27
Writing Training Objectives - 2	1.28
Writing Training Objectives - 3	1.29
Organising yourself to Study	1.30

PART 4 PERSONNEL MANAGEMENT & RELATED ASPECTS

Recruitment Advertising	1.31
Absenteeism	1.32
The Manager's 4 Roles	1.33
Industrial Relations	1.34
Dismissal & the Law	1.35
Authority in Organisations	1.36
Interactive Skills	1.37
Improving Interactive Skills	1.38
Using Interactive Skills	1.39
Personnel Management - Fields of Activity	1.40

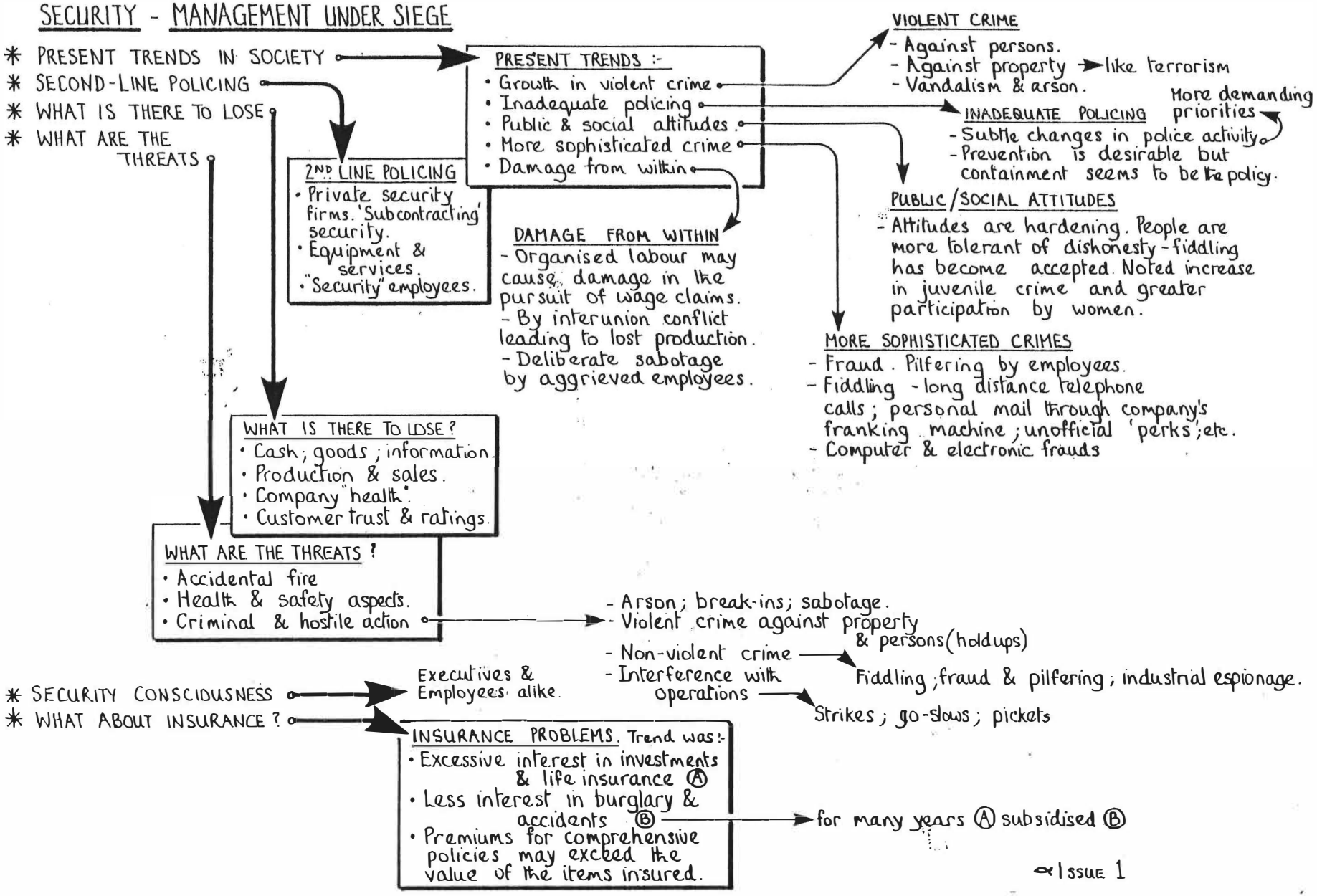
PART 5 PERFORMANCE

Solving Performance Problems	1.41
Performance System	1.42
Performance Aids	1.43
Performance Situation Appraisal	1.44
Performance Management	1.45
Job Modelling	1.46
Performance Pyramids	1.47
Training for Performance	1.48
Job Accomplishments	1.49
Value Analysis	1.50

PART 6 KEYWORD INDEX

Keyword Index	p 51 - 53

SECURITY - MANAGEMENT UNDER SIEGE



Issue 1

1.01

EFFECTIVE SECURITY

* WHAT ARE THE MAIN AIMS ?
* WHAT DO YOU NEED ?
* HOW DO YOU START ?

MAIN AIMS ARE :-
- Prevention
- Deterrence
- Detection

PREVENTION - aims to frustrate the person with an intent to commit an offence.

DETERRENCE - often works psychologically neutralising a propensity to commit an offence.
- threats (of action) "we always prosecute...."
- notices (of installations) "beware - guard dogs" "C.C.T.V. fitted here" obvious burglar alarms, etc.
- evidence of security hardware & procedures. uniformed guards, identity checks, bag searches, etc.

NEEDS :- to start with;
- Good advice,
- Good engineering,
- Good procedures,
- Good maintenance

(You usually get what you pay for !)

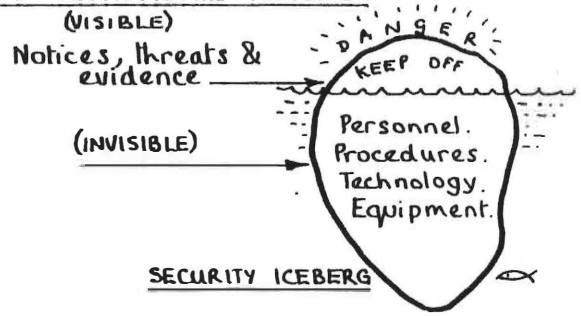
STARTING
- Initiate a security audit of :-
  - people,
  - premises,
  - procedures.
- Who will do it ? → Internal - management. External - consultant.
- Consider all aspects → Physical; commercial; legal & financial.

DETECTION - objectives.
- To detect illicit people/things intended for committing an offence.
- To detect breaches in security as they occur.
- To detect offences as soon as possible after they have been committed.

* THREE FEATURES OF SECURITY
  - Hardware
  - Personnel
  - Procedures

- Hardware → Fixed → eg. electronic surveillance, electronic guard devices, special furniture, etc. bars, barriers, etc.
- Hardware → Movable → eg. vehicular security, containers, etc.
- Personnel → eg. sedentary or patrolling officers, security manager & staff → require raised awareness; training for emergencies; enforcement procedures leading to increased tolerance.
- Procedures → eg. checking → who checks ? who is checked ? how often & where ? when ? what search rights ? how acceptable is this ?
- Procedures → prevention
  - identify & anticipate risks & offences concerning buildings, vehicles, plant, materials, cash, etc.
  - look for gaps in security - When is vulnerability increased ? What alternative points of entry ? etc.
  - warn of measures to be taken.
  - work organisation - rerouting cash carrying personnel, etc. to avoid predictable movements.

* SELECT, DEVELOP, EVALUATE & ADOPT APPROPRIATE POLICIES.



INTERNAL POLICING

* WHOSE RESPONSIBILITY IS IT ?
* SPECIALIST PERSONNEL
* HOW ABOUT INSURANCE ?
* DETECTION & PROSECUTION
  - Few exceptions from prosecutions leads to better deterrence.

WHOSE RESPONSIBILITY ?
- Who might become involved ?
- Owners, devolved to ....
- Line managers, or.....
- Specialist personnel.

WHO ?
- Regular police personnel.
- Fire authorities concerning safety.
- Local authorities concerning bylaws.
- Central government concerning legislation eg. Health & Safety aspect.

Crime prevention, Linked alarm systems, Joint monitoring activities.

SPECIALIST PERSONNEL
- What image have they ?
- What measures to use ?
- What educating do they need ?

IMAGE ?
- Sinister / spylike / mistrusting.
- Sensitive / open / encouraging.
- Well disciplined / apply procedures evenly.
- Cooperating with staff & working by consent. Encouraging a climate of honesty.

MEASURES should not be too extreme such that health is damaged or employees alienated.

INSURANCE ?
- Good insurance can be expensive. Lays down minimal standards of security to be maintained.
- Possibly lower premiums if security measures adequate.
- No insurance - raise prices to pay for losses.

EDUCATING in standard procedures, recognising early warning signs of disaffection among employees; seeking always to learn & improve standards.

* HOW MUCH SECURITY ?
* COMMON DILEMMAS

HOW MUCH ?
- Commensurate with the potential threat
- Comprehensive
- Anticipatory - early warning

Over securing is expensive. Under securing is wasteful.

- Sum of all practical measures are as strong as the weakest link.
- Always anticipate the worst that could happen, then plan for it.
- Should contain an element of suprise for the thief / attacker (by varying the security procedures & routines.)
- The protectors must be protected against people and things.
- Security systems must have a back-up, be mutually supportive, not working in isolation eg. secondary power supply.
- Quality & good organisation is important. You get the security you you pay for.
- Don't give specialist security staff other tasks which distract attention.
- Maximise complicity of staff (- too many to subvert!) & make responsibility easy to trace.

- Systems must give an early warning; cause maximum delay & so enhance the possibility of detection.
- Security breaches occur when a 'target' is identified. Make reconnaissance as difficult as possible.

DILEMMAS
- Concentrating the risks makes them easier to defend.
- Dispersing the risks makes them vulnerable.
- How to avoid bottle-necks which concentrate risks & increase vulnerability to attack.
- Sensitive information - who needs to know ?
- Secure areas - who needs to enter ?

Leaking info°. reduces speculation & gossip & accidental breaches of security.

PERSONNEL SECURITY

- ✳ EMPLOYER'S CONCERN
- ✳ HOW TO PROCEDE
- ✳ WHAT TO LOOK FOR WHEN VETTING
- ✳ THE SECURITY INTERVIEW

EMPLOYER'S CONCERN

- Current behaviour of employees.
- Future behaviour of new employees.
- IDEALLY - the elimination of dishonest practices detrimental to the company.
- IN PRACTICE - the containment of these dishonest practices.

Vetting may be necessary.

These may include :-
- Swindling & misappropriation of funds.
- Pilfering.
- Breaches of document security.
- Breaches in computer security
- Industrial espionage.
- Other illicit practices.

HOW TO PROCEDE

- Establish secure procedures
- Handle your personnel with care

- Classify jobs according to risk/ sensitivity to the company. → A - high risk/ sensitivity; B - serious risk; C - prejudicial to company 'health'
- Establish a security budget.
- Adopt security procedures for continual 'vetting'.
- Always stress where security is vital.
- Raise the level of security consciousness by training & education, leading to 'security by consent.' → Encourage alertness. Inculcate security skills. Deter.
- Maintain high levels of morale, trust & loyalty among the workforce.

- Avoid exposing individuals to temptation.
- Involve staff more, especially the unions.
- Take care in transfers within the company.
- Employ anti-collusion devices which require more than 1 person to breach security.
- Pinning responsibility clearly upon persons makes it difficult to avoid detection.
- Careful recruitment for special jobs should include security interview/ investigation.

WHEN VETTING employees, look at :-

- Behaviour within the company.
- Home & social activities.

Look for :-
- over extravagant lifestyle,
- sexual / other immorality or perversions,
- confirmed gambling habits,
- past record of criminal activity,
- undesirable associates,
- doubtful political affiliations,
- other factors .....
& listen to gossip.

Look for :-
- changed attitudes,
- emotional instability,
- drinking on the job,
- evidence of persistent absenteeism,
- other factors depending on specific types of employment.....
& listen to gossip.

THE SECURITY INTERVIEW

This should feature as a part of the recruitment interview. Take care to :-
- Get applicant's approval.
- Be relaxed.
- Be open & honest about its purpose.
- Check referees by 'phone
- Guarantee confidentiality of information disclosed.
- Lead on to

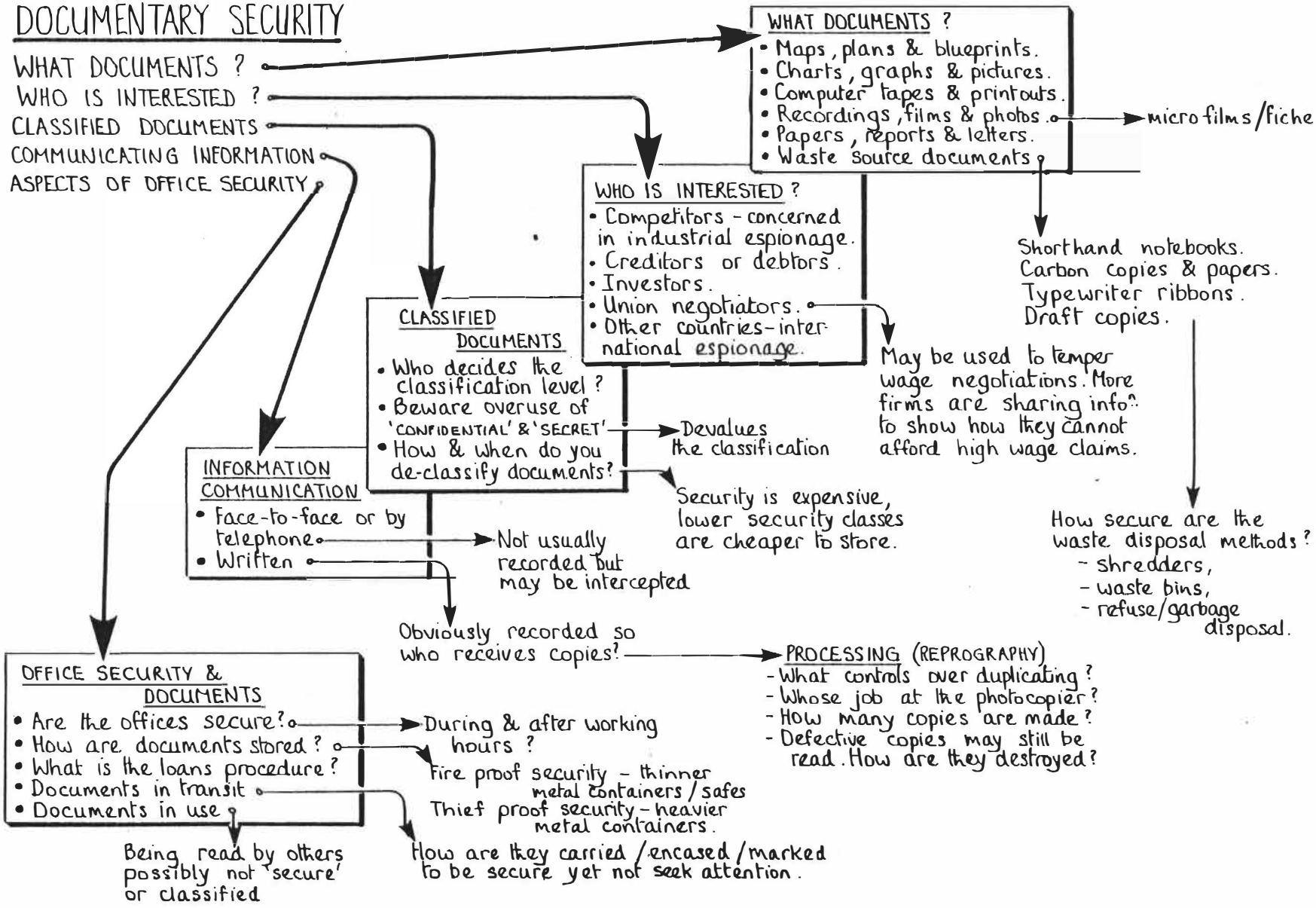
Signed contract covering trade secrets, etc.

Check number in the directory. Don't necessarily accept the 'phone number offered.

∝ Issue 1

DOCUMENTARY SECURITY

* WHAT DOCUMENTS ?
* WHO IS INTERESTED ?
* CLASSIFIED DOCUMENTS
* COMMUNICATING INFORMATION
* ASPECTS OF OFFICE SECURITY



SECURITY & INDUSTRIAL RELATIONSHIPS

* TO WHOM DOES THIS 'SECURITY MINDEDNESS' APPLY ?
* HOW IS IT INTRODUCED ?
* WHAT TRAINING OR EDUCATION ?
* LEGAL IMPLICATIONS OF BREACHES ?

IT APPLIES .....

- To management & workforce alike → Must be seen to be consistent.
- Fairness to be seen in the restrictions applied.
- It improves the 'image' if no one is seen to be 'above security' or training.

Following a SECURITY AUDIT

HOW TO INTRODUCE SECURITY MEASURES

- Explain the measures to everyone :-
  - Why are they necessary ?
  - Create the climate for honesty. → **CREATE THE RIGHT CLIMATE**
    - Try to raise/improve morale.
    - Involve the workforce if possible.
    - Encourage loyalty & pride in in their job and the company.
    - Help to increase job satisfaction.
- Select the security officer & staff carefully so they show discretion & are respectful of persons.
- Set up a 'Security Committee' → **SECURITY COMMITTEE** should contain :-
  - Representation from management.
  - Representation from the unions. (This reduces disharmony, antagonism, misunderstandings, gossip, etc.)

  They must establish a code of conduct; reporting procedures (upwards & downwards); limits of security ; agree security procedures ; agree penalties for not following procedures ; extent of training; review local & central government legislation which applies to this company.
- Establish a security budget.
- Establish training procedures. → Include 'crisis management' procedures.

LEGAL IMPLICATIONS

- Awareness & responsibility may be highlighted in the
  - contract of employment,
  - code of practice,
  - in the company's customs, traditions & conventions.
- What rights of stop, search and arrest are given to the security personnel.
- What penalties may be incurred ?

- For contravention of civil law- prosecution by police.
- For lesser infringements of company regulations- company may prosecute. However, over enthusiastic action may precipitate union displeasure. Use a disciplinary committee. Also witnesses have a different status when appearing before committees compared with a court of law.
- If too severe - breeds 'us & them' image; 'BIG BROTHER' image → mistrust & resentment.

TRAINING IN SECURITY TECHNIQUES

- Will it be compulsory or voluntary ?
- Training should be commensurate with Job Descriptions & general security awareness.
- What rights & duties have individuals & security personnel.

"Security can only work through consent in a democracy"

What is the union attitude to :-

- security,
- security training,
- security education,
- security vetting & clearance,
- security audits
- penalties for breaches.

(1) COMPUTER SECURITY (WHERE DO YOU START ?)

* SECURE FROM WHAT/WHOM ?
* COST OF SECURITY
* PROCEDURES TO FOLLOW

SECURE FROM .....
- Environmental hazards → Discipline & good housekeeping reduces these hazards (S.105b)
- Mismanagement & personnel problems. → Identify risks & maintain adequate personnel security policies. (S.104d)
- Direct or deliberate threat → Theft, fraud, sabotage & strikes. Action may be taken to counter these threats.

COST OF SECURITY
- In the installation costs.
- In the back-up duplication & storage of materials.
- In maintaining a secure system.
- In continuing vigilance.
- In personnel costs → eg - selection procedures, - job rotation policies, - high salary commitment.

DOES YOUR SYSTEM MERIT THESE COSTS ?

PROCEDURES
- List the risks → Draw up a computer security risk inventory listing ..... - items, - practices, - security systems, - standards, - insurances.
- Quantify the risks → - Obtain concensus about the effect of data loss in - time & inconvenience, - effect on consumer service, - replacement costs (time & money).
  - Under what circumstances might you lose data ?
  - Replacement of plant — under what circumstances might you lose plant ? - time to replace, - interim arrangements, - cost of replacement.
- Get commitment of senior management. → **COMMITMENT** - to agree on potential risks, - to assign responsibility, - to budget accordingly, - to take necessary action, - to monitor test & review procedures.
- Communicate that commitment to those who will be affected.
- Obtain commitment of lower level operatives, employees, etc.
- Implement the measures, monitor & provide feedback to senior management.

Draw up a review document listing - section / responsibilities / items covered / steps taken / steps to be taken / security system / security practices / date checked.

COMPUTER SECURITY (2) - PHYSICAL

PROBLEMS ARE OFTEN INHERENT IN THE SITING OF THE COMPUTER FACILITY WHEN ADAPTING PREMISES OR BUILDING NEW ACCOMMODATION.

* LOCATING THE COMPUTER
* ENVIRONMENTAL CONTROL
* FIRE PRECAUTIONS
* POWER SUPPLIES
* ACCESS TO THE FACILITY (See S.104d)

LOCATION

- Is it to be a 'high security' facility?
  - out of sight?
  - sealed premises?
- Are premises being adapted?
  e.g. basements - permit even environmental conditions; are readily secured; use spare space below ground level.
- Are rooms designed to accommodate the facility?
  - air conditioning; secure; non-combustible materials used in construction; etc.

ENVIRONMENTAL CONTROL

- Mainframe facilities demand air conditioning. Consider:
  - back up conditioning system,
  - fire precautions,
  - greenhouse effect of lots of glass windows,
  - protected inlet & outlet ducting.

Below ground facilities need protection from flooding
- from external sources,
- from burst pipes above the instalation,
- from damaged drains & sewage spills.

POWER SUPPLIES

- What are the effects of power failure upon:-
  - the computer facility,
  - the air conditioning,
  - the data stored or being processed,
  - the network of terminals.
- In industrial areas, how stable is the power supply? (Free from surges or fading).
- Is a back-up system of power generation feasible?

FIRE PRECAUTIONS

- Consider local bylaws & national legislation (H.&S.) concerning fire protection,
  - of premises (access by fire service),
  - regarding personnel (exits, etc.)
- What fire detection methods, if any, will be employed within the facility.
  - air conditioning may affect ceiling smoke/heat detectors.
- What effect might fire elsewhere in the building have upon the computing facility?
- How will fire be tackled? What affect will water/ CO_2 extinguishers have?

(3) COMPUTER SECURITY (SYSTEMS & APPLICATIONS)

* CONSIDER THE SYSTEM
* CONSIDER THE APPLICATIONS
* WHAT TO DO

Initiate an on-going review of existing procedures & identify gaps in the system through a computer security risk inventory.

WHAT IS THE SYSTEM ?

Your system consists of :-
- the hardware (mainframe computer)
- the software
- the terminal hardware
- communication system linking the mainframe to the terminals

HARDWARE (see S.105b)
- Mainly covered in dealing with the physical security aspect.

SOFTWARE
- Built in security in software is usually nominal eg passwords or codes to restrict access by unauthorised individuals.
- Software programs are complex; few persons understand them; few are able to design-in security features; few could penetrate them.

BUT THESE FEW DO EXIST

COMMUNICATION SYSTEMS
- Are they capable of being tapped?
- Where might they be tapped ?
- Can information be 'scrambled' or 'coded' ?

What would it cost to do it ?
What might it cost NOT to do it ?

TERMINAL HARDWARE may be :
- simple display units,
- sophisticated computers themselves.

Check on :-

- Authorised personnel – who uses it & when ? Logged use by identified users with a user-code.
- Unauthorised personnel prevented by
  - limited access,
  - codes & surprise code changes,
  - keys.

DON'T IGNORE OBVIOUS ABUSES IN PURSUIT OF POTENTIALLY OBSCURE ABUSAGE

WHAT ARE THE APPLICATIONS ?

These cover computer & non-computer applications :-
- WHO collects WHAT data manually ?
- ENCODING that data for in-putting (data capture)
- The computer PROCESSING
- The DISTRIBUTION of data output.

Covers :
- File security - storage of back-up &/or duplicate data at remote locations & risks whilst in transit.
- File identification.
- File accuracy - control functions should detect inaccuracies whether accidental or deliberate.
- File access whilst in library or storage.

MAN : MACHINE INTERFACE
- Probably well established procedures exist from pre-computing days. Require well disciplined procedures to check quality control of documents against computer listings.

PROCESSING
- Controls are mainly arithmetical &/or procedural to ensure complete & accurate data capture & processing.

SECURITY AUDITING & DISASTER PLANNING

* WHO DOES THE AUDITING ?
* ROLE OF INTERNAL AUDITORS
* MODERN ROLE EXTENSIONS

EXTERNAL AUDITORS
- Responsibilities are clearly defined by statute to express an opinion on the company's accounts.

INTERNAL AUDITORS
- No statutory requirements. They primarily check on systems & procedures but are currently becoming more involved in computerisation where it exists.
- They rarely have computer expertise & few computer personnel have audit exposure.

INTERNAL AUDITORS' ROLE

To define the required demands & ...
- ensure adequate audit & security requirements are incorporated.
- review application systems & controls.
- review computer security policy, procedures & disaster testing .....

To ensure that systems & procedures are working since few systems have security as a prime objective.

MODERN ROLE EXTENSIONS No system is static & operational systems must be subject to on-going modifications. The auditors must :-
- Ensure long-range application planning, design & implementation.
- Avoid unnecessary expenditure.

They may :-
- Advise on training in computer security.
- Advise on management's approach to computer security

* IMPLICATIONS OF DISASTER TESTING

AUDITORS & DISASTER TESTING

Internal auditors must consider the implications of :-
- Total or partial destruction of facilities.
- Malfunction of environmental resources.
- Total or partial destruction of user manual procedures.
- Loss of key computer personnel.
- Disruption by strike.
- Loss of stored transaction data in computer readable form.
- Loss of stationery stocks.

* PLANNING FOR DISASTER

PLANNING FOR DISASTER

Internal auditors will identify weaknesses in the system & prepare specific plans for every eventuality giving :-
- Arrangements & responsibilities for implementing those arrangements & initiating recovery procedures for transmission & network facilities.
- Plans for the storage of master copies of documentation.
- Plans covering any one item of eqpt. in the system, not just electronic eqpt.

PLANNING (continued)
- How to find what has been destroyed
- Ways of ensuring good security practices are being routinely enforced & personnel are aware & prepared for disaster.

This requires an inventory.
- what is on it ?
- who keeps it ?
- who compiles it ?
- when is it updated ?
- etc.

MARKETING PLANNING

* WHAT IS MARKETING PLANNING ?
* THE ADVANTAGES OF MARKETING PLANNING
* PROBLEMS OF THE MARKETING PLANNER
* STAGES IN MARKET PLANNING

DEFINITION
- A logical sequence of activities leading to the setting of marketing objectives & the formulating of marketing strategies.

ADVANTAGES OF MARKET PLANNING
Leads to :
- Maximising revenue.
- Maximising profit.
- Maximising return on investment.
- Minimising costs.

STAGES IN MARKET PLANNING
To some degree you must :-
- Analyse the external factors of the company's environment
- Analyse the company's (S.W.O.T.) strengths ; weaknesses ; opportunities & threats.
- Examine the company's objectives.
- Perform a marketing audit.
- Decide upon the marketing objectives & strategies

OBJECTIVES & STRATEGIES
- Objectives - what you want to achieve
- Strategy - how you plan to achieve your objective

Concerned with .....
- selling ; product features ; pricing policy ; place ; promotion aspects ; etc.

PROGRAMME FOR ACTION

SUB-OBJECTIVES STATED

Concerned with .....
- products & markets ;

Stated in quantitative units which which can be measured.
Avoid qualitative expressions.

- Should have same time scale & processes.
- Should appreciate & incorporate S.W.O.T.

PROBLEMS OF THE MARKET PLANNER
- Lack of support by senior mgt.
- Lack of a plan to implement market planning.
- Distancing planners from line managers.
- Use of numerical data without narrative to explain strategy.
- Overplanning
- People's perceptions
- Separation of long-term strategic plans from short-term operational plans
- Failure to integrate market plan with corporate plans

LACK OF SUPPORT
Preponderance of engineers &/or accountants in senior positions who may not understand marketing principles.

LACK OF A PLAN
- Demands are for immediate, obvious benefits, lack of patience.
- Failure to gain people's support ∴ Communicate plans to people.
- Lack of training in new techniques.

People make systems work so design systems around people.

DISTANCING PLANNER FROM MGR.S
- Failure to communicate (not speaking the same language).
- Line managers ignorant of marketing principles.
- Planners ignorant of line mgr.s problems.

PEOPLE'S PERCEPTIONS
- This is the annual mgt. 'game' divorced from reality, having low importance!
- The function of 'the planner' who is subsequently resented &/or ignored by mainstream business mgr.s

OVERPLANNING
- Demanding too much data which may not be used.
- Generating paperwork & demotivating staff.

MARKETING AUDITS

* THE MARKETING AUDIT - WHAT IS INVOLVED ?
* TYPES OF AUDIT
* WHO DOES IT ?
* HOW DO YOU MEASURE SUCCESS ?

A MARKETING AUDIT
- Collects & analyses info: & data from the business environment..... then through...
- An un-biased review & appraisal, help to....
- Identify strengths & weaknesses as they relate to opportunities & threats, (external) enabling mgt. to....
- Treat the causes (not the symptoms) of the company's problems.

Uses the information in the Corporate Plan.

THE CORPORATE PLAN asks:-
- Where are we now ?
- Where are we going ?
- How will we organise our resources to get there ?

TYPES OF AUDIT
- External audit - mainly the uncontrollable variables within the company's environment.
- Internal audit - mainly controllable variables within the company's organisation.

OPPORTUNITIES & THREATS in the business & economic environment could include:
- political, legal & fiscal changes,
- socio/cultural factors,
- market characteristics,
- competitors' activities & products.

WHO DOES IT ?
- Line managers, in their own areas of responsibility, annually. → are they objective enough ?
- External consultants → may be expensive

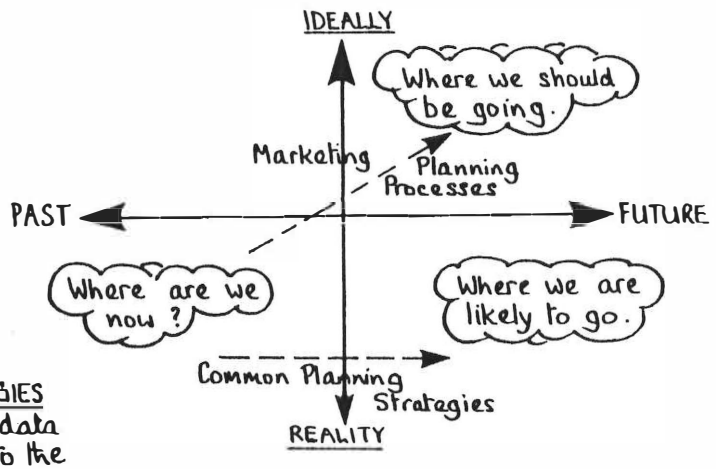
MEASURE SUCCESS - by asking
- Are you meeting financial objectives consistently?
- How are you coping with change?

- Internally, &
- Externally.

WHAT DO YOU DO WITH THE M.A.?
→ Use it as a basis for setting marketing objectives & strategies.

COMMON PLANNING features:-
- Have financial objectives,
- Sales forecasts, &
- A budget (the numbers game).

These have their uses but don't say 'HOW' it will be done → **COMMON PLANNING STRATEGIES** are based on historical data which is extrapolated into the future



PACKAGING TO SELL (1)

* WHY IS PACKAGING IMPORTANT ?
* PURPOSE OF THE PACKAGE
* ADVERTISING & PACKAGING

WHY IS IT IMPORTANT ?

- When rival products are so similar, reasoned choice diminishes & price & packaging will decide → creates uniqueness where none exists.
- Greater movement towards self-service & self-selection in shops so the packaging is the salesman → packaging appeals to the customer's emotional needs. (see S.131e)
- Experience shows the packaging sometimes more important than the product.
- Packaging is part of marketing is part of providing consumer satisfaction at an acceptable profit.

PURPOSE OF THE PACKAGE

Traditionally listed as :-

- to contain the product,
- to protect the product in transit & storage.
- to sell the product.

(see S.131f)

ADVERTISING & PACKAGING

- Advertising helps establish brand identity.
- Packaging must be instantly recognised & confirm the advertising at the point of sale →

Failure to do this means the advertising is selling the product group (competitors as well) & not just your brand.

PURPOSE (continued)

- Enables global distribution.
- Ensures product quality & conformity.
- Improves the product.
- Improves customer appeal.
- Distinguishes product from competitors.
- Can reduce costs from manufacture to point of sale.
- Makes you want to spend money on a particular brand.
- Excite unplanned purchases →

Arrest shopper's gaze, invite him/her to handle it/persude & sell... ..... all in a matter of seconds!

Within a store - bulk & individual packaging may :-
- cut waste, - reduce spoilage, - stop pilfering,
- speed price marking, handling & displaying,
Packaging may decide whether a store will carry your brand or not.

PACKAGING TO SELL (2)

* THE PACKAGING DILEMMA
* PACKAGING MUST SATISFY EVERYONE.
* PSYCHOLOGICAL APPEAL OF PACKAGING

THE PACKAGING DILEMMA

- It has to attract attention in a store.
- It may become a part of someone's home & be looked at frequently so must fade into background. This means it must carry limited advert!

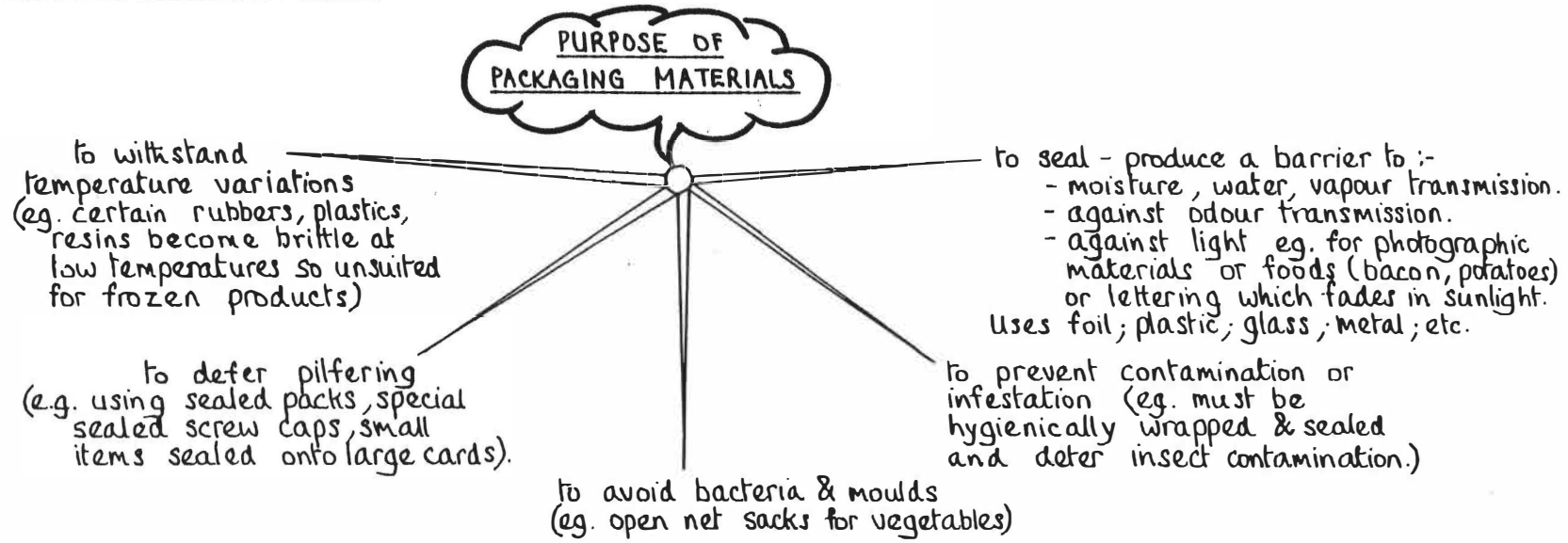
WHO MUST BE SATISFIED ?

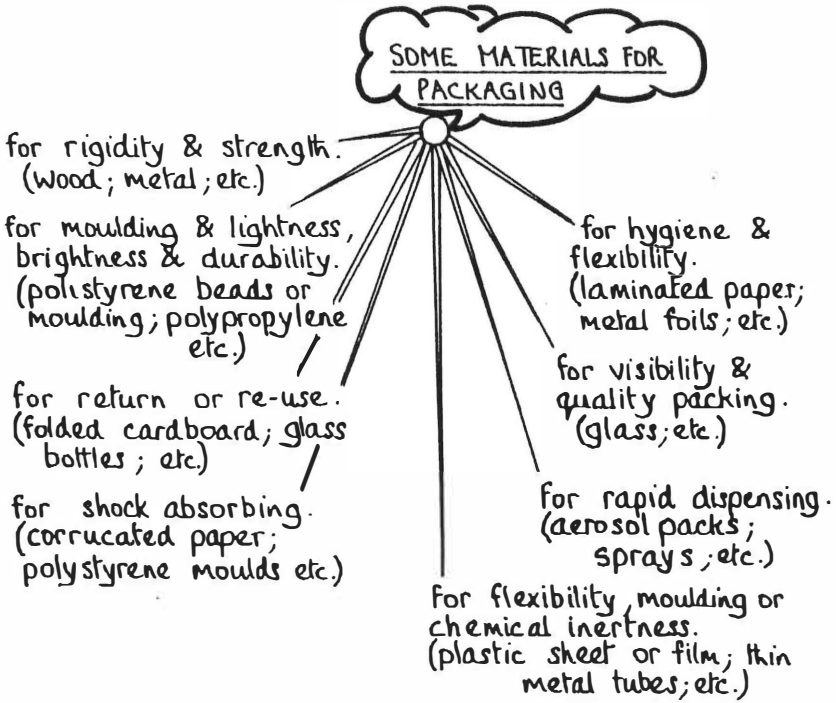
- PRODUCTION dept. want a package which :
  - can be made simply & cheaply,
  - suitable handling characteristics,
  - permit mechanical handling, possibly at high speed.
  - provides protection from all hazards
    - eg. of transportation - shock, impact, vibration.
    - of storage - stacking & compression.
    - of climate - damp or dehydration.
    - of unknown destinations - hot or cold.
- MARKETING & ADVERTISING dept. want to :
  - attract & satisfy customer wants.
  - enhance the product's prestige.
  - ease of display at point-of-sale.
- DISTRIBUTORS want :
  - a package which will carry the product safely, & store easily.
- RETAILER want a package which is :
  - easy to identify in bulk
    - Cartons marked 4 sides.
    - Identified top & bottom.
    - Case opening instructions.
    - Quantity, pack size, date, etc.
  - economical on shelf space (stack easily).
  - display well & sell quickly (multipacks).
  - improved product visibility.
- CONSUMER wants a package which is :
  - easy to identify a preferred brand.
  - easy to open, close & re-use, see user instructions.
  - easy to identify price, size, contents, etc.
  - easy to consume at home, in car, on beach, etc.
- MANY MARKET SEGMENTS
- THE CHANGING FASHIONS & TRENDS OF MODERN SOCIETY

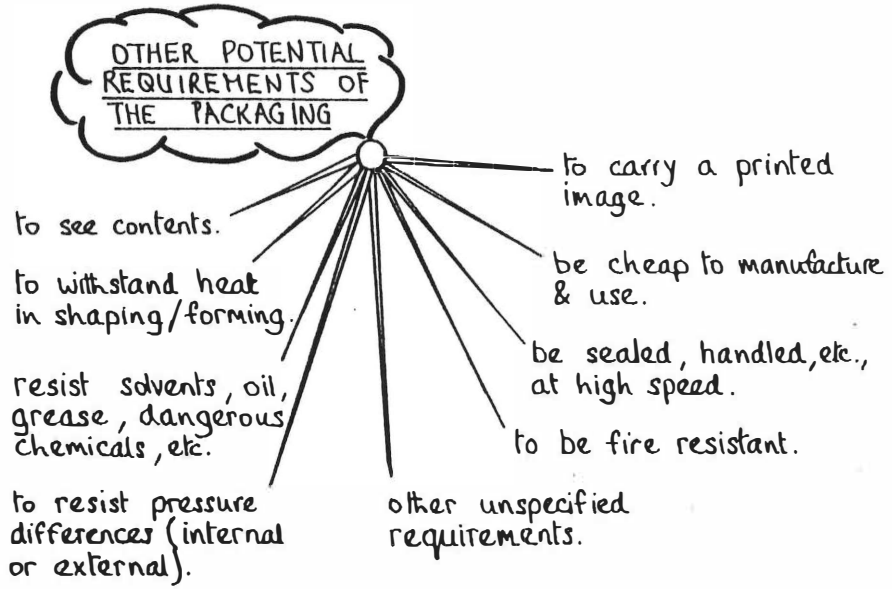
PSYCHOLOGICAL APPEAL

- Must make the decision to buy easier even across market segments.
- Reassure the consumer their choice was the correct one.
- Counter feelings of inadequacy, loss of pride or absent feelings of satisfaction due to lack of joy/fun in creating something when using INSTANT "X" !
- Appeal to the consumer's real wants & not what the manufacturer thinks s/he wants.

PACKAGING (MATERIALS & REQUIREMENTS)







PROCEDURE FOR DECIDING ON THE PACKAGING

1. STATE THE OBJECTIVES
2. SET PARAMETERS

SETTING PARAMETERS
- Are there TIME constraints ?
- What BUDGET is available ?
- WHO is in charge ?
- Who should be consulted ?
- Who will make the DECISION ?
- Any WEIGHTING on components/ information, decisions, etc.

One man - packaging coordinator
or - a packaging committee

3. STATE THE PROBLEM

UNIQUE PRODUCT PROBLEMS
- its physical properties,
- its chemical properties,
- any particular hazards,
- any particular susceptibilities,
- anticipated shelf life, etc.

MANUFACTURER'S PROBLEMS
- what equipment have you ?
- what equipment might you need ?
- how fast or automatic need it be ?
- how many will be needed ?
- what materials will be used ?
- who will do it ? Yourselves or buy-in ? etc.

MARKETING PROBLEMS
- who buys it, & why ?
- what are your competitors doing, & why ?
- what is the best physical shape & structure ?
- user convenience (opening & reclosure).
- how will the product be displayed ?
- what distribution channels & methods ?
- physical requirement, ratio of package weight to product weight.

FINANCIAL PROBLEMS
- what is the unit price ...
  - of the package,
  - of the product.
- include design fees & printing costs.
- buying-in - best discounts ?
- where can economies be made ?

4. DEVELOP A 'PACKAGE PROFILE'

PROFILE
- Physical characteristics.
- Standards of protection.
- Merchandising ; storage; handling requirements.
- Cost

5. DECLARE ALTERNATIVES

List advantages & disadvantages for each permitted alternative.

AND PRODUCE SAMPLE PACKAGES FOR TESTING

TESTING
- as singles,
- as multiple packs,
- to simulate ageing,
- for 'road testing'.

→ Develop detailed specifications for each package tested & feed back the information to the decision maker(s).

→ BEST PACKAGE AVAILABLE AT LOWEST COST WHICH WILL SATISFY ALL THE MARKETING, MANUFACTURING & CUSTOMER REQUIREMENTS

HOW PACKAGING COMMUNICATES
(WITH THE CONSUMER)

* BY DESIGN
* USE OF COLOUR
* CHANGING THE CONSUMER'S PERCEPTIONS
* TRADE MARKS & CORPORATE SYMBOLS
* APPEALING TO PARTICULAR MARKET SEGMENTS

BY DESIGN - the package is a marketing tool.
- Attracts or fails to attract attention.
- Communicates faster than anything else.
- Shapes the character of the product.
- Communicates the company's image.
- May NOT transfer from one product to another.
- Excites impulses & feelings.

New design characteristics may change consumer acceptance of an established product giving it
- a new image,
- a new size,
- a new price

⇒ a 'new' product ?

TAKE CARE - that the impulses are not disturbing or alienating.

MARKET SEGMENTS
- Marketing dept. needs to know why people buy & co-ordinate from 'needs' IN to the 'product' (& not vice-versa.)
- You may be selling images & appealing to new emotional & psychological segments.

USE OF COLOUR

The quickest path to the emotions to be chosen for their marketing effectiveness.
- Children ⇒ 6yrs respond best to colour.
- May influence emotional, mental & spiritual aspects.
- Colour expresses the virtues of your product.
- Colour preferences are linked also to the sophistication & environment of consumer.

TRADE MARKS & SYMBOLS
- Communicates an impression to the consumer.
- Good corporate symbols express favourable things about its products.

CHANGING PERCEPTIONS

Shapes might confer.....
'strength, security & durability'
'sharpness, neatness & cleanliness'
'security, plentifulness & generosity'
etc.
..... in people's perception of the product.

SMALLER may infer 'more expensive & precious'.
LARGER might infer 'more bountiful & expansive'.

ROLE OF MARKET RESEARCH IN PACKAGING DESIGN

Market Research cuts risk by studying the consuming public eg. people prefer to buy well packaged materials; the roles of women are changing with increased freedoms and buying patterns; etc.

* ROLES OF MARKET RESEARCH
* TYPES OF RESEARCH
* REACTIONS TO RESEARCH

ROLES OF MARKET RESEARCH

- To investigate obvious features
  - is it 'user-friendly'?
  - is the 'wet strength' adequate?
  - is it properly sealed?
  - etc.
- To study consumer characteristics
  - Who are they?
  - Why do they buy?
  - What are they actually buying?
  - How old are they?
  - Where do they live?
  - etc.
- What can the package do to encourage new people to buy.
- Define packaging & marketing problems to speed creativity.
- To put into management's hands the evidence to permit packaging decisions to be made.

TYPES OF RESEARCH

- Market or Survey Research
- Motivation Research
- Laboratory testing

Market or Survey Research

Uses 'quota' &/or 'random' sampling or consumer panels.
- May use questionnaires to determine customer reactions as well as straight answers about preferences.
- To describe the market & then explain it.

Laboratory Testing

- The obvious tests of package strength, etc.
- Perception & optics testing. Uses a selection of apparatus designed to observe eye movements to determine relative properties of attention-getting/eye-holding/brand recognition product identification/ etc.

Motivation Research

- To uncover consumer needs & preferences.
- To define questions to be used in Survey Research.

Also preference testing - uses the same product inside different packaging. "Which PRODUCT do you prefer?"

REACTIONS TO RESEARCH

- It is expensive & slow.
- It reduces unorthodox innovation.
- It sometimes fails.
- No substitute for experience & the creative spark.
- Good judgement is better than bad research.
- Good judgement is not better than the best research.
- FACT - package design, based on sound facts, influences sales.

1. SHARPENING YOUR SELLING TECHNIQUE

* IN-DEPTH ANALYSIS OF YOUR PRODUCT
* SATISFY THE BUYER'S NEED FOR INFORMATION
* STUDY YOUR COMPETITOR'S PRODUCTS
* NEXT MOVES

ANALYSE YOUR PRODUCT
- Identify the unique COMPONENTS of the product.
- Identify the specific & different ELEMENTS of your company's back-up.
- What RESULTS may be expected by using your product.

How many COMPONENTS give that RESULT ?

Is it your unique COMPONENT which gives this RESULT ?

How many RESULTS ?

BUYER NEEDS TO KNOW
- WHAT RESULTS your product will give, and
- WHY will he get those results by using your products exclusively.

THE COMPETITION
- What unique elements, etc ?
- What components, etc. ?
- What results, etc ?

Why do your customers stay with you ?
- quick personal service ?
- reliability ?
- nationwide network ?
- package design features ?
- etc.

Why do your COMPETITORS keep their customers ? Can you match their unique ELEMENTS of service, etc. ?

NEXT MOVES...
- Don't run down your competitors.
- Don't compare products

Stress your company's policy of promoting, manufacturing, servicing, etc.

- It may offend the customer whose judgement is questioned.
- It may harden the customer's opposition / resistance to you.
- Acknowledge that good competition exists.

IF CUSTOMERS BUY ON THE BASIS OF COMPARISON - SELL ON THE BASIS OF COMPARISON

Identify the ELEMENTS of your company's service which are different & specific and SELL THEM !!

Issue 1

2. MOTIVATING THE BUYER & SELLER

* Why does the BUYER buy ?
* What does the SELLER sell ?
* How does the seller INFLUENCE the buyer ?

WHY BUY ?
Thoughts in the buyers mind :-
- I need it → Raise their sights to our products.
- I would like to own it. → Accentuate the benefits of owning our products.
- Having it would improve my comfort/leisure/living/etc. → Go for comparison selling - buy ours.
- I always shop there. → Customers are creatures of habit.
- Did I do the right thing ? → Assure them of your product's performance ; supplier reliability; after-sales service; etc.

SELLER SELLS .....
Seller does not create needs, he/she satisfies them by selling.
- Sell the benefits of ownership → - PHYSICAL Benefits, - EMOTIONAL Benefits
- Sell the results of ownership

INFLUENCING THE BUYER
- Study their needs & wants → NEEDS can be exposed & WANTS created.
- Tailor the talk to each unique customer
- Are you talking to the right person
- Believe in your product
- Be assertive

Compare wanted results of ownership with the un-wanted results of not owning the product.
* Wanted results are a good motivator.
* The unwanted results of NOT owning are a more powerful motivator to buy.

- Be specific whenever possible.
- Have they the authority / finance / etc. ?
- Are you covering THEIR needs & wants ?

Believe you can fill customer's needs & wants.

AVOID the 'high pressure' seller who.. → SELLS - where there is no need.
SELLS - more than the existing need.
SELLS - more than their capacity to pay.
SELLS - with 'patter' in poor taste.
GRABS & RUNS.

►► CREATIVE SELLING - sells where no sale existed.

TANGIBLE
- Saves money .....
- Safer .....
- Longer working life...
- Keeps you healthy....
- More leisure time....
- etc.

LESS TANGIBLE
- Confidence in the product & the company.
- Peace of mind with the product's performance.
- Status that comes from owning one.
- Pride in owning one - others will see and envy.
- Satisfaction in the service it/we give.
- etc.

3. OVERCOMING BUYER RESISTANCE

* TOO HIGH PRICE !!
* WHAT TO DO ABOUT YOUR HIGH PRICE
* CLINCHING THE SALE

TOO HIGH could mean :-
- I cannot afford it.
- I see no difference between yours and a cheaper version.
- The cheaper version will do all that I require of it.

CANNOT AFFORD IT.
- With individual (personal) buyers it may be true.
- Less likely with company buyers.

SO
- Identify the real reason for the resistance.
- Negotiate to overcome the resistance, ie. sell.
- Don't vary the price, vary the package on offer.

OR
- Terminate the interview.

VARY PACKAGE
- Any discounts ?
- Trade-ins ?
- Special offers ?
- 'Free' gifts ?
- EXTRA elements in your company's back-up services.?

WHAT TO DO ?
- Defend the price ?
- Justify the price ?

SO
RAISE CUSTOMER'S PRODUCT AWARENESS by emphasising :-
- extra COMPONENTS which make yours a better buy.
- extra RESULTS, more than the cheaper version.
- Low cost buy → high cost usage ?

OR
- Terminate the interview

Leads to CUSTOMER-DOMINATED interview.
Don't defend the price.

ATTACK PRICE OPPOSITION
through :-
- Product knowledge.
- Customer knowledge.
- Competitor knowledge.

- Know what you are selling.
- Make a confident, logical, convincing presentation.
- Low cost buy → possibly high user cost.
- High cost buy → probably lower user cost. (including intangible, emotional plusses)

- Show the extra worth of your product over cheaper version.
- What extra do you offer ? (Service; parts; discounts; advertising; reliability; etc.)

- Know their needs.
- Know who you are selling to.
- Justify why they MUST have your product.

CLINCHING THE SALE - saying 'YES'
Following awareness and interest comes BELIEF in your sales talk.

- What successes verify your claims ?
- What COMPONENT virtually guarantees that RESULT ?
- Which ELEMENT underpins our service ?
- Demonstrate it / put it in their hands !

BUT
be doubly, trebly, sure it will work before you do it !!

The successes must be
- independent,
- relevant,
- can be verified, &
- have happened in places & circumstances similar to this customer's,

It works with others, it will work with you.

BUT

What about those valid criticisms ?
- 1st concede the point.
- 2nd diminish the point, mentioning your COMPONENTS, ELEMENTS & RESULTS.

What about all those questions ?
- They are not necessarily signs of resistance.
- They imply interest & a need for information.
- The customer wants to believe & be sure

TOP TIER SELLING

* CHARACTERISTICS OF TOP-TIER PEOPLE
* WHY CONCENTRATE ON TOP-TIER PEOPLE ?
* WHAT ARE YOUR KEY ACCOUNTS ?

CONCENTRATE ON TOP-TIER PEOPLE because selling to the top is :-

- Better than finding new markets.
- Risk : reward ratio is favourable.
- Allows high-margin pricing.
- Means fewer but better sales.
- Customer oriented.
- Industry dedicated.
- Can be effective

Especially where your services or products are replicated by rival companies.

YOUR KEY ACCOUNTS are the top 20 % of your customers who produce 80 % of your profit.
IT MAKES SENSE to give them special attention & cultivate contacts with their senior management.

TOP-TIER PEOPLE IN AN ORGANISATION

- Refuse or reject normal vendor tactics.
- Work where the major decisions are made.
- Are less influenced by price considerations.
- Want to learn about their own business.
- Interested in demonstrable improvements.
- Want their objections answered **NOT** overcome.

* **CHARACTERISTICS OF SELLING TO TOP TIER MANAGEMENT**

Sell as a consultant & customise your product or service to suit them.

- Your approach is data dependent, 'information intensive' concerning the customer's own business.
- Use your customer's perspective- sell improved profit & value - not products.
- Know how to improve their business.
- Discuss financial values you **WILL** deliver.
- In the consultant role act like the customer's own staff, not an outsider.

This sort of approach requires a careful & accurate information back-up system by your own company to be able to send you out able to talk their language intelligently.

SELLING TO SENIOR MANAGEMENT (TOP-TIER SELLING)

* PLANNING TO PENETRATE SENIOR MANAGEMENT
* PROPOSING A SOLUTION
* HANDLING YOUR CUSTOMER
* ADVERTISING & SALES PROMOTION

PENETRATING SENIOR MGT.
- Know who makes the decisions & how they are reached.
- Research current industry data.
- Research current raw material provision.
- What are this customer's individual problems & his solutions.
- What are your solutions in financial terms.
- Evaluate your solutions in terms of customer added profit.
- Develop options.
- Eliminate errors which lower your credibility to solve the customer's problems.

PROPOSING A SOLUTION
- Present your knowledge of the customer's own business & how profit is made.
- Partner mutual improved profit making → WIN : WIN situation
- Give options in financial terms for solving their problems.
- Determine & satisfy customer's most compelling needs.

Objective orientated

HANDLING YOUR CUSTOMER
- Make alliances with top management. → Sales build alliances but alliances build sales also.
- Help people improve themselves & their performance.
- Maintain customer continuity.
- Know your customers & their companies.

Make allies

Collaborate with your allies.
Educate & learn about each other.
Seek convergent objectives.
Negotiate in mutual self interest.

DO YOU KNOW.....?
- What is profitable for that company ?
- What needs to be improved?
- How to respond to their problems?
- What your proposals will cost them ?
- What improvements they will see?
- How much more profitable is your solution?
- How do you know it will work? (Have you a track record?)
- How soon can you implement it ?

ADVERTISING & SALES PROMOTION
- Showcase your customers → - Use their claims & testimonies. - Use their results & case evidence. - Stress "we can do the same for you."
- Package according to the level at which you are promoting.
- Use trade shows & exhibitions stressing profit improvement.
- Aim for key accounts & top tier customers.

∝ ISSUE 1

CLOSING A SALE

* WITHIN THE PROSPECT'S OFFICE
* THINK POSITIVELY
* LISTEN CAREFULLY
* USING LANGUAGE

IN THE CUSTOMER'S OFFICE
- Orientation.
- Don't waste time.

- Avoid sitting directly opposit in 'confrontation' position.
- Keep to one side and divert attention away from desk litter.

THINK POSITIVELY
- Retain control of interview.
- Look for a chance to close.
- Counter complaints "Yes...but..."
- Plan for resistance & counter it before it arises.
- Don't let the prospect 'put off' a decision.

- Your/their time!
- You are not there for the conversation.
- If they only want a chat – recognise this & exit.
- If they cannot make a decision find someone who can or terminate the interview.
- Make it easy to say "YES!"

LISTEN CAREFULLY
- Listen for signals which imply a sale is imminent
- Don't interrupt

e.g. "How long is the warranty?"
"When can you deliver?"
- Be prepared to cut short your presentation & close the sale.

- Face-to-face, use literature sparingly.
- Requests for brochures may be a 'stall' tactic.

USING LANGUAGE - choose your words with care :-
- Not 'Sign the contract...' but '...complete the paperwork...' or '...complete the agreement.'
- NOT...'cost'...'purchase'... but (softer)...'investment'...'own this.'

- Delay price discussion as long as possible.
- State price & keep talking of the benefits.

Don't delay - it'll pay for itself that much sooner.

* YOUR ATTITUDE
* THE EFFECT OF YOUR PERSON ON THE BUYER

YOUR ATTITUDE
- Be sincere.
- Be confident.
- Be optimistic.
- Be polite & smile
- Observe courtesies
- Project yourself

- Build confidence.

- Project & sell yourself.
- Be pleasant & cheerful.
- People buy from people they like & tend to pay less attention to the price.

Remember - as you have been studying the buyer, so they have been studying you too.

PERSONAL PREPARATION
- Be rested. To be tired is to lose enthusiasm
- Keep your sense of humour
- Personal grooming
- Be organised & assertive.

- Be clean. Don't offer offense by ignoring personal hygiene.
- Dress tastefully. Think of your image & your customer's perception of you.

LEARNING

* How do people learn ? Learning modes.
* Factors in people's learning styles
* Higher level brainfunctions
* Factors which promote or impede higher level brainfunctions.

LEARNING MODES (STAGES)

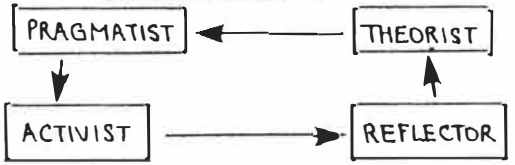
- Theorist
- Pragmatist
- Activist
- Reflector

Learners may change from one to another in succession

FACTORS IN PEOPLE'S LEARNING

- THEORIST - recognises value of other's experience; Strong sense of values; reasons for doing things.
- PRAGMATIST - knows world is complex; an intuitive realist; organisation is too valuable for experiment.
- ACTIVIST - pleasure from action; doing things. Most work requires straight energy & guts..
- REFLECTOR - recognises a logical, understandable world; humility in analysing own weaknesses; wants high value output.

LEARNING CYCLE



HIGHER LEVEL BRAINFUNCTIONS

Include :-

- Strategic planning.
- Problem solving.
- Decision making.
- Learning from experience / others.

FACTORS INFLUENCING HIGHER LEVEL B/Fs

- Morale at work
- Maturity of individuals
- Time pressures.
- Stress
- Mental speed
- Brain dominance

MORALE

of individuals,
of departments,
of the organisation.

TIME PRESSURES. Promoted by:-

- Staff shortages,
- Uneven work sharing/ delegation.
- Very short-term jobs.

MATURITY

- What is his/her level of maturity?
- How stable is (s)he?
  - psychologically,
  - emotionally.
- How realistic & flexible is his/her planning ?

FACTORS INFLUENCING MATURITY

- Need to learn to survive ....eg. 26-32 year group
- Emotional support & security.... ..eg. young exec. getting married
- Life cycle factors eg. major promotion in prospect.

STRESS & WORRY

- Mind rests on uncertainties - can't let go.
- Compulsive action avoiding examination of the situation or personal actions.
- Optimistic planning ahead to avoid confronting real situations.
- Decision & problem overload.

MENTAL SPEED - ALERTNESS - MEMORY - RESIDUAL SKILLS

- Can the executive quickly move into different levels of conceptualisation and thinking?

BRAIN DOMINANCE

MEMORY

LEFT	RIGHT
Analysis	Synthesis
Words	Pictures
Planning	Prioritising
Action	Idea Generation
Sequential	Spatial

TRAINER'S VIEW OF

COMPUTER BASED TRAINING (C.B.T.)

C.M.L. = Computer Managed Learning
C.A.I = Computer Aided Instruction
C.A.L. = Computer Assisted Learning

* FEATURES OF C.B.T.
* C.B.T. LINKED WITH C.M.L.
* PROBLEMS WITH C.B.T.

FEATURES OF C.B.T.

- The presentation is modern, challenging & the (T.V.) mode is familiar to the trainee.
- The presentation is standard for all trainees. Trainers' ideosyncracies lost.
- It can be made available:
  - day or night,
  - on- or off-shift.
- It can be available at several remote location around a site. (or around country)
- Self-pacing - it waits until the trainee is ready to start (or continue).
- There is the economy of re-use & possibly multi-purpose use.
- Self instructional - it may be enlivened by colour graphics to be more interesting.
- It is confidential reacting with/to the trainee. No-one else knows their inadequacies (if there are any.)
- May need to be supplemented by other non-computerised activities, especially in the field of management training.

FOR THE TRAINEE

- Time for the idea to be accepted & to be motivated.
- Time to become familiar with the hardware, mainly key board skills

Reduced by the use of touch sensitive (TV) screens

FOR THE TRAINER

- Time to become familiar with C.B.T. & get experience.
- Perpetual lack of suitable software packages to fulfil your exact needs.
- Other time problems

LINKED WITH CML.

It will already:
- test trainees,
- mark answers &
- give immediate feedback. Now it will:
- Keep & monitor records of trainee's progress.
- Find suitable programs to suit trainee's needs.
- Guide trainee through long sequences of programs.
- Make training records available to trainer.

* WILL THE TRAINER PROGRAM (ME) HIM/HERSELF OUT OF A JOB ?

WONT MY JOB BE DIMINISHED ?

Who will :-
- Innovate & design new learning sequences?
- Evaluate its efficiency, financially and educationally ?
- Supplement areas of difficulty ?
- Fight for the finance to implement C.B.T. ?
- Organise the overall training programme ?
- Handle 'interpersonal' aspects of training ?
- Decide the most appropriate training system to achieve training objectives ?
- Select & develop other necessary media packages ?
- Initiate C.B.T. & tell the computer what to do ?
- Undertake the training needs analysis & counsel & select courses/candidates ?

..... certainly not the computer

The computer may help in one or two of these tasks later on.

OTHER TIME PROBLEMS

Developing C.B.T., especially when putting programs together yourself, exposes a greater need for:
- needs analysis of requirements.
- writing special objectives (affective, behavioral & cognitive)
- selecting the best system (hardware & software)
- testing pre- & post-instruction.
- evaluation against other traditional training methods.
- counselling & feedback for/to the trainees.

These are all 'time expensive'.

Initiating C.B.T. requires a heavy investment of funds. The costs are 'front loaded' onto the training budget. Benefits may be slow coming. You have got to get it right - first time!

WRITING TRAINING OBJECTIVES (1)

* WHY WRITE OBJECTIVES ?
* THE ROLE OF THE COMPANY TRAINER
* AIMS versus OBJECTIVES
* CLASSIFICATION OF OBJECTIVES

WHY OBJECTIVES ?

- To focus attention on the specific requirements of a particular training situation.

WHEN OBJECTIVES ?

- Objectives should be written first as all other actions depend upon them.

WHY WRITE OBJECTIVES ?

- Objectives are precise statements which help define clearly the changes which the training has to achieve.
- They require knowledge of the subject (in terms of pre- & post- training expectations) to enable the trainer to :-
  - limit ambiguity of interpretation,
  - ensure measurement to determine the effectiveness of the training,
  - decide on the best learning strategy to achieve them.
- They provide a terse summary of the course.

TRAINER'S ROLE

- The outcome of training is CHANGE.
- Trainers are CHANGE AGENTS.

(The changes are usually ill-defined)

AIMS versus OBJECTIVES

- AIMS are statements of what the trainer wishes to achieve
- OBJECTIVES take 'AIMS' apart to list the constituent attitudes, skills, knowledge or behaviours which it is desired to change.

AIMS - are usually broadly based and are permitted to be vague & ambiguous.

CLASSIFICATION OF INSTRUCTIONAL OBJECTIVES

- They may be classified into the 3 domains of learning:-
  - Cognitive,
  - Affective, &
  - Psychomotor.

(See S.204/76)

WRITING TRAINING OBJECTIVES (2)

* WHAT IS THE PURPOSE OF OBJECTIVES
* TRAINERS' PRE-REQUISITE ROLE
* TYPES OF OBJECTIVE
* THE LANGUAGE OF OBJECTIVES
* HIGHER ORDER LEARNING

OBJECTIVES MUST :-

- Describe the activity to be mastered ....
- Set down the conditions under which it may be performed .....
- State to what standard it must be performed or with what competence.....
- Be accompanied with details of METHOD of measurement & by WHOM.

TRAINER'S PRE-REQUISITES

- Analyse the desired skill/knowledge required to perform an activity.
- Assess the trainee's capability to do it now.
- Assess what extra training is required to complete the activity to a particular level of competence.

TYPES OF OBJECTIVE

- Cognitive objectives → Define desired knowledge to be acquired by the end of a learning sequence.
- Affective objectives → Define desired new attitudes following learning activities.
- Behavioural objectives → Define desired terminal behaviour following training.
- Psychomotor objectives → Define desired new motor skills to be acquired following training.

USE OF LANGUAGE IN WRITING OBJECTIVES

- Since objectives have to be specific & unambiguous, the words used must be specific & unambiguous.

► **WORDS TO BE AVOIDED**

- to KNOW,
- to UNDERSTAND,
- to APPRECIATE,
- to LEARN, etc.

HIGHER ORDER LEARNING

- CLASSIFICATION - using recalled information to classify things not seen or met before.
- RULE USING - learners use rules to produce results in a situation where outcome is unknown.
- PROBLEM SOLVING - uses learned rules or info? on an 'unknown' situation to produce a desired outcome.

COGNITIVE OBJECTIVES

Divide into :-

HIGHER ORDER LEARNING
LOWER ORDER LEARNING

LOWER ORDER OBJECTIVES

- Memory tasks eg. recalling, identifying, recognising, etc.

► **WORDS TO USE**

- to ADJUST,
- to ARRANGE,
- to LIST,
- to CHANGE,
- to EXPLAIN, etc.

HIGHER ORDER OBJECTIVES

- Manipulating information eg. classifying, categorising, etc.

► **WORDS TO USE**

- to ANALYSE,
- to COMPARE,
- to PLAN,
- to DISTINGUISH, etc.

WRITING TRAINING OBJECTIVES (3)

* WHY DO YOU CLASSIFY INSTRUCTIONAL OBJECTIVES ?
* HOW DO YOU CLASSIFY INSTRUCTIONAL OBJECTIVES ?
* WHAT MAIN FACTORS CAN AFFECT TRAINING OBJECTIVES ?

CLASSIFY INSTRUCTIONAL OBJECTIVES

- To check accuracy & sequencing of groups of activities
- To develop appropriate instructional strategies
- To write appropriate test items
- To facilitate the writing of objectives

- Makes writing objectives easier & clearer.
- It is important to measure learner performance accurately.
- Different types of learning require different methods of instruction.
- Sometimes LOW ORDER tasks are pre-requisites of HIGH ORDER tasks.

CLASSIFYING OBJECTIVES

The 3 learning domains are :-

- COGNITIVE
- AFFECTIVE
- PSYCHOMOTOR

AFFECTIVE DOMAIN includes :-

- Attitudes, leading to kinds of behaviour.
- Interests.
- Values.
- Emotional states.

PSYCHOMOTOR DOMAIN includes :-

- Body movements,
- Manipulation of stimuli,
- Overt physical activity,

leading to the development of physical skills & coordination

COGNITIVE DOMAIN includes :-

- Recall,
- Recognition of knowledge,
- Recognition of intellectual higher order skills eg. problem solving.

MAIN FACTORS AFFECTING TRAINING OBJECTIVES

- Conditions
- Performance
- Standards

STANDARDS

- Attainable / capable of achievement.
- Level of performance required.
- Need to compare ACTUAL performance with MINIMUM DESIRED performance.

PERFORMANCE

- Must be an observable action of some kind.
- Statements of objectives MUST contain an appropriate verb.

CONDITIONS should be :-

- Realistic.
- Accurate.
- Clearly expressed
- Used to limit or enlarge what a trainee has to do.
- Complete

INDUSTRIAL TASKS

Referring to shopfloor tasks only, they fall most commonly into cognitive & psychomotor domains.

ORGANISING YOURSELF TO STUDY

The common complaints of mature students are :-

- cannot stick at a task for long
- don't know what to do next
- take an age to get started
- seem to be easily distracted
- cannot work in the evenings
- don't get any support
- I'm not as good as those young students

CAN'T STICK AT TASKS

- Concentration spans are usually about 20 mins. with lapses in between.
- Split work into small (achievable) chunks.
- 'Little & often' will complete tasks less onerously
- To overload oneself with large tasks is to de-motivate yourself.

Total No. hours/week is less important than the number of hours of EFFECTIVE study.

WHAT TO DO NEXT ?

Organise yourself :-

- Plan your study time, spend one session/week allocating tasks to time spots.
- Prepare the materials you will need, in advance.
- Go to your selected work place knowing you have :-
  - the task to do,
  - the tools to do it,
  - the time to do it, then ....
- Reward yourself on completing a task → Have a break/a coffee/cigarette/½ hr. TV/visit toilet/etc. Plan next task.

NOT AS GOOD ?

Rubbish .....

- Most mature students are :
  - better motivated,
  - better organised,
  - more experienced.
- Most have the same unreasonable inferiority complex concerning their abilities.
- Compare notes & you'll find this out.
- Compare results with youngsters .... AND STOP FEELING INFERIOR !

ORGANISE A 'WORK ENVIRONMENT' with :-

- Good lighting, heating & ventilation.
- All the materials you will need.
- Good working surface, correct height for you.
- Comfortable seating & space to spread out.
- Your study plan exhibited to check against.

Also :-

- Don't drink or overeat beforehand. Creates drowsiness.
- Plan to avoid/prevent interruptions → Let friends know that - day is your study day. Cut short phone calls ... ... " I've work to do ... "

SUPPORT FROM WHOM ?

- Colleagues ? you'll have to be firm & do what YOU want.
- Family ? have you really explained why you're doing it ?
- Try making a contract ..... "I'll do ..... if you'll do .... agreed?"
- Involve them if you can.

CANNOT WORK IN EVENINGS ....

O.K. - when can you work ?

- People's rhythms differ, some are daytime/late night/early morning workers. Try and identify your 'best time' & arrange things accordingly.

REMEMBER - if you think you can or if you think you cannot ..... you're right !!

RECRUITMENT ADVERTISING

* Where to advertise
* Media advertising
* Press advertising
* What to say
* Other advertising
* Other considerations.

WHERE TO ADVERTISE
- Internally.
- Externally.

What systems exist within the company ?
- notice boards
- newsletters
- house magazine
- grapevine
- employees pay envelopes.

- By personal contact.
- Use recruitment agency.
- By advertising
  - Use media.
  - Job centres & agencies.
  - Direct to educational establishments
  - Agencies & professional registers.

MEDIA ADVERTISING ?
You need to know.....
- What budget is available?
- What sort of time scale/ or degree of urgency?
- What coverage is required

- Journals could be :-
  - monthly,
  - quarterly.
- Check lead times for :-
  - agency artwork & copy.
  - printers of journals.

Local Radio, T.V.

PRESS ADVERTISING
- Local Press.
- National Press.
- Journals.
- Weekly advertisers.

COVERAGE
- Local.
- Regional.
- National.

COVERAGE
- Selective advertising (e.g. Journals)
- Broadcast (eg. daily newspapers, radio, etc.)

WHAT TO SAY
1. Job title.
2. Key characteristics.
3. Aspects of person specification.
4. Relevant factual info".
5. Salary & working conditions.
6. How to respond to advert

TYPES OF ADVERT.
- 'Run-on' → e.g. situations vacant, c. 30 words.
- 'Semi-display' → e.g. double column, print, c 200 words.
- 'Paper set' display → e.g. boxed, differing type faces, etc.
- 'Trade set' display → e.g. boxed, pictures, return slip, etc.

OTHER CONSIDERATIONS
- Pool of abilities.
- Degree of unemployment.
- Permanence of the job.
- Company image.
- Buyer's or seller's market.
- How to minimise unsuitable candidates.
- Other costs

- Beware misleading job titles.
- Salary negotiable.

COST OF :-
- Advertising
- Interviewing
- Getting the wrong man.

HOW TO RESPOND
- Write/ phone for details of job &/or application forms.
- Send letter & c.v. .....
- Find referees .....
- Call and talk .....
- Visit job centre ....
- Other alternative courses of action.

Issue 1

PAPERS :-
A171 - Recruitment & Selection

ABSENTEEISM

* Why is it an important factor ?
* Usual reasons for absence ?
* Ways of reducing absenteeism.
* Change procedures.

WHY IS IT IMPORTANT ?

- Absenteeism costs money
  - Direct costs
  - Indirect costs

DIRECT COSTS

- Production lost.
- Scrap/waste levels higher.
- Increased manufacturing down time.
- Rescheduling problems.
- Late delivery

Customers not satisfied, Lost orders.

INDIRECT COSTS

- Effect upon other employees :-
  - morale suffers,
  - efficiency lowered.

REASONS FOR ABSENCE

- Certified sickness.
- Uncertified sickness.
- Authorised absence.
- Unauthorised absence

- For good reasons.
- For no good reason.

REDUCING ABSENTEEISM

- Examine personnel records for details of absences.
- Analyse reasons for absence & look for trends.
- Talk to staff & supervisors.
- Counsel persistent offenders
- Change procedures.

ANALYSE REASONS

Look for absenteeism in :-

- particular age groups,
- particular grades of employees.
- full- or part-time employees.
- particular departments.
- particular occupations.
- personal characteristics

PERSONAL FACTORS

- Male or female.
- Married or single.
- Long- or short-term employees
- Particular ethnic groups.

CHANGE PROCEDURES

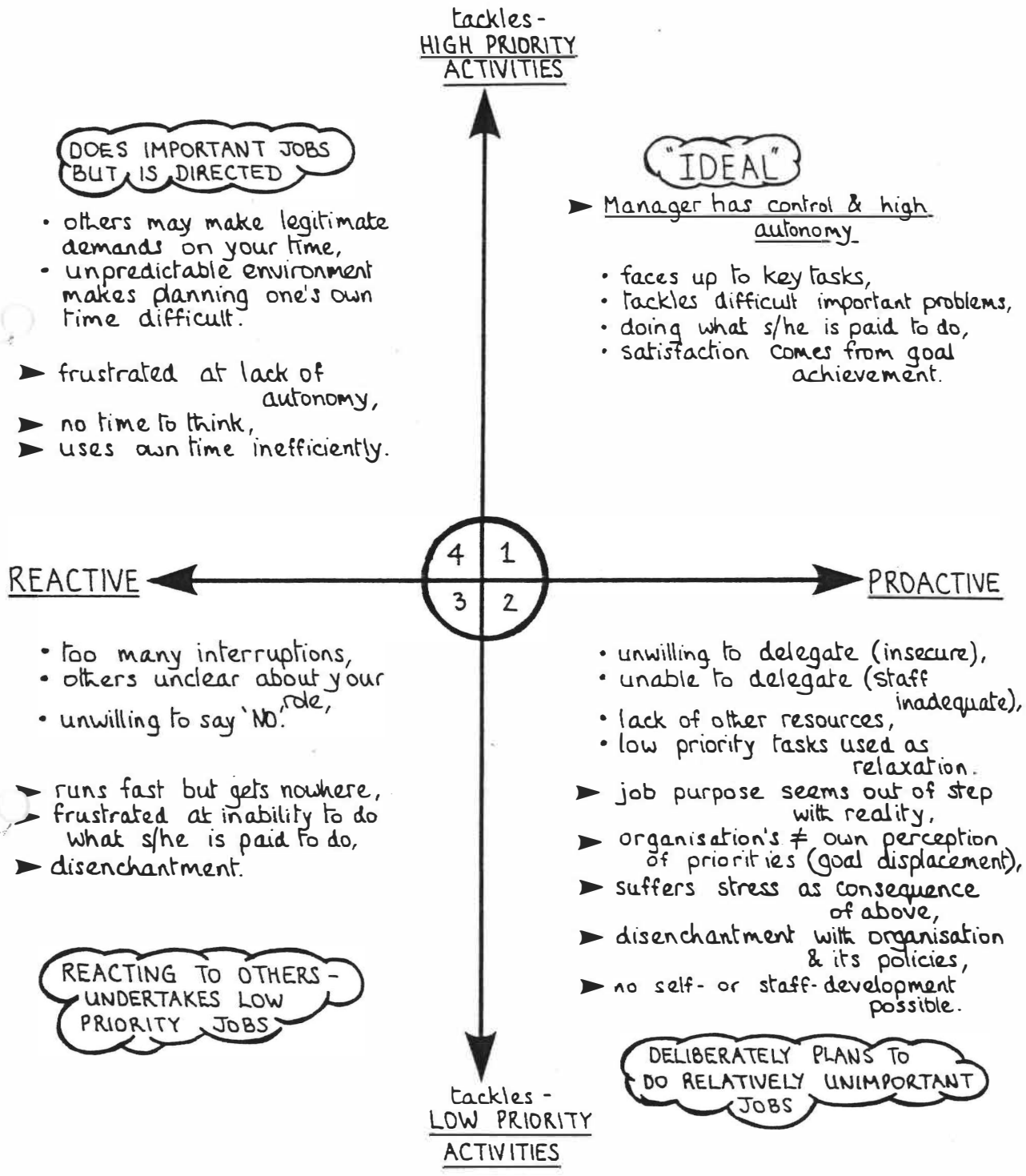
- Job Redesign
- Flexible working hours.
- Incentives for good attendance.
- New disciplinary procedures.
- Better communications.
- Different managerial attitudes.
- Check on recording procedures.

JOB REDESIGN

- Introduce piecework.
- Finish & leave.
- Greater involvement.
- Line v. cell assembly.
- Smaller working groups to increase cohesion.
- Better working conditions.
- Safer procedures
- Complete v. part tasks

ISSUE 1

THE MANAGER'S 4 ROLES
(or 'Which quartile are you in today'?)



• Symptoms
► Consequences

INDUSTRIAL RELATIONS

* DEFINITIONS OF I.R.
* PHILOSOPHIES OF I.R.
* COLLECTIVE BARGAINING CONTENT
* THE STATE'S INVOLVEMENT
* POWER IN I.R.

DEFINITIONS OF I.R.

- A study of the instructions of JOB REGULATION (FLANDERS)
- A study of the rules governing employment, together with the way they are made & changed, interpreted & administered. (CLEGG)
- The nature & development of CONFLICT itself. (HAGERISON)

BASIC PHILOSOPHIES of I.R.

- Pluralism
- Voluntarism
- Primacy of Collective Bargaining

POWER IN I.R. (quotation)

'Power derives more from the routine application of effectively unchallenged assumptions than from the manifest dominance of one factor, group or, policy over others in open conflict.'

(WESTERGAARD & RIESLER)

COLLECTIVE BARGAINING CONTENTS may be:-

- Substantive, or
- Procedural

PROCEDURAL

Regulates the conduct of the relationship between the parties to the coll^ve agreement over grievances, dismissal, redundancy, recognition, etc.

SUBSTANTIVE

Regulates the contractual employment relationship between employer & employee covering pay, hours, holidays, conditions, etc.

C.B. preferred to either joint consultation, external conciliation, arbitration or even worker participation in decision making.

PLURALISM

- Industrial organisations comprise groups.
- Management & employees have different aims & aspirations which are the source of their conflict of interests.
- IR. is concerned with resolving these conflicting interests through substantive and procedural regulatory rules.

More simply put.....
'Them and us'
'Management's right to manage'
'Employee's/Unions right to challenge management decisions'

THE STATE'S INVOLVEMENT

- Provides a legislative framework of
  - Individual Law,
  - Collective Law.
- Provides Advisory, Conciliation & Arbitration Services (A.C.A.S.)

VOLUNTARISM

- Free collective bargaining for fixing pay & conditions.
- Non-legal system of I.R.
- Complete autonomy of bargaining partners.

More simply put.....
'Free voluntary collective bargaining'
'The right to strike'

DISMISSAL & THE LAW

* WHEN DOES DISMISSAL OCCUR?
* FAIR GROUNDS FOR DISMISSAL
* UNFAIR GROUNDS FOR DISMISSAL

DISMISSAL OCCURS WHEN....

- The company terminates the employee's contract.
- Employee resigns as a result of employer's behaviour (CONSTRUCTIVE DISMISSAL)
- Expiry of contract.
- An employee resigns while under notice following dismissal.
- An employee has been on strike followed by selective re-engagement.
- An employee is refused work following maternity leave.

UNFAIR GROUNDS
may include :-

- Trade Union membership or union activities.
- One's race.
- One's sex or marital status.
- A "spent" criminal conviction.

'FAIR GROUNDS' may be for :-

- Misconduct,
- Redundancy,
- Breach of Law,
- National Security reasons,
- Incapability or lack of qualifications,
- Any other substantial reason.
- Striking.
- Non-membership of a trade union in a union membership agreement situation.

CAN THERE BE UNFAIR DISMISSAL and REDUNDANCY ? "YES, if ...."

- the reasons given are inadmissable,
- it's contrary to a Code of Practice,
- it's against agreed procedures or normal arrangements.

* WHO CLAIMS 'UNFAIR DISMISSAL' ? → Full-time employees working 16 (or more) hours per week having worked continuously for the company for at least 52 weeks.
* WHO DECIDES ?

If the dispute goes to a tribunal...

- Employer must prove fair dismissal,
- Employee must prove unfair dismissal,

.....the tribunal will decide. (The employee has 3 months to bring a case.)

* WHAT REMEDIES ARE AVAILABLE ?
  - Compensation &/or
  - Re-engagement or re-instatement.

WRONGFUL DISMISSAL when there is a lack of notice given or money in lieu of notice.

THE COMPANY DOES NOT HAVE TO TAKE BACK THE DISMISSED EMPLOYEE.

Legislation correct APRIL 1984

AUTHORITY IN ORGANISATIONS

* TYPES OF ORGANISATION
* TYPES OF AUTHORITY
* HIERARCHY IN ORGANISATION OF AUTHORITY

TYPES OF ORGANISATION
The two extremes are:-
- MECHANISTIC
- ORGANISTIC

MECHANISTIC ORG'NS
Are characterised by:
- a stable predictable environment,
- specialisms obvious,
- tasks well defined,
- authority vested in the hierarchy,
- value loyalty & obedience.

ORGANISTIC ORGANISATIONS
Are characterised by:
- less stable, open environ^{t},
- many specialisms,
- tasks continuously redefined according to needs,
- authority more democratically dispersed,
- high commitment to task.

TYPES OF AUTHORITY
- Overt
- Covert

COVERT AUTH'Y
- exercised through the 'political' system.
- continuous competition for power.

OVERT AUTHORITY
- exercised through formal authority systems.

HIERARCHICAL ORGANISATION
A system of rules
↓
Offices / Officers
↓
Powers
↓
Procedures to follow
↓
Depersonalisation
↓
A RATIONAL ORG'N

ADVANTAGES OF RATIONALITY
- Strength in its organisational form.
- Rules & procedures.
- Depersonalised, not subject to individual whims.
- Information is recorded & available for reference.
- Suited to a mgt. hierarchy giving effective control.
- Qualification-based experts may be appointed to specific managerial roles.

↓

IT CAN CALCULATE THE CONSEQUENCES OF A PARTICULAR ACTION

* AUTHORITY IN ORGANISATIONS

AUTHORITY
- Charismatic
- Traditional
- Rational/legal

CHARISMATIC
- Depends upon personal qualities of an individual.
- Can be weakened by succession & subsequently declines.

TRADITIONAL
- Depends upon precedent & usage.
- Authority, bound by custom, may develop along FEUDAL or PATRIMONIAL lines according to circumstances.

RATIONAL/LEGAL
- Bureaucratic - relates to aims/functions/goals.
- Passed on through office holder.
- Strengthened by new rules & procedures.
- Information or resource control means POWER.

INTERACTIVE SKILLS

* WHAT ARE INTERACTIVE SKILLS ?
* WHAT IS MEANT BY OUR BEHAVIOUR ?

INTERACTIVE SKILLS - Definition
Those skills used in face-to-face encounters when we are organising our behaviour to achieve certain objectives.

Common interaction situations would include bargaining, coaching, training, problem solving, domestic arguments, etc. The list is potentially limitless where 1:1 or 1: many interactions may come about.

OUR BEHAVIOUR

- The things we do which are OVERT & observable. The are a mixture of:
  - reflex muscle movements
  - learned communicating behaviour
- We will sometimes 'arrange' our behaviour to increase the probability of being successful, achieving objectives.

REFLEX MOVEMENTS - Usually 'motor' habits, gestures & movements we unconsciously make

Sometimes called 'behaviour shaping' (see S.301c). May be a simple as a yawn (non-verbal) or an Open question (verbal).

LEARNED COMM^NS
May be verbal or non-verbal – all visible features

Grouped together they contribute to our 'body language'

* WHAT MUST WE LOOK TO IN BEHAVIOURAL TERMS ?

- Our own behaviour matters because it influences others in face-to-face interactions
- The important factors are our interactive competence & personal credibility

- The boundary of your behaviour is set by your personality.
- Personality = sum of our unique capabilities & inclinations.

* HOW DO WE BECOME COMPETENT ?

- We become skilled in interactions by involvement in face-to-face interaction. We must :
  - Observe others,
  - Interpret their actions, (perception)
  - Arrange our behaviour to suit the objectives of the interaction.

Skills are learnt, acquired formally or informally, leading to identifying behaviour most appropriate to the current situation.

This assumes the need, occasionally, to consciously adjust our behaviour to achieve our objectives during, or following, interactions.

- Of less importance are
  - technical expertise,
  - temperament, &
  - attitude towards people → attitudes, feelings & motives are less visible

- In interpreting others' behaviour, we are always speculating because we see only the outer signs & must guess their inner feelings from their behaviour.
- Our interpretation is conditioned by our past experience.
- We are frequently wrong or we mis-read other's behaviour.

IMPROVING INTERACTIVE SKILLS

* SETTING OBJECTIVES BEFORE INTERACTIONS
* WHAT IS AN OBJECTIVE ?
* SOME BENEFITS OF SETTING OBJECTIVES
* WHEN SETTING OBJECTIVES

SETTING OBJECTIVES

- Setting objectives for an interaction does not change the interaction. → You can have interactions without objectives.
- Having objectives requires an 'activity' to be performed to achieve them.
- Absence of objectives may be indicated by comments e.g. → "…. all day in meetings, and nothing achieved…" "… no time to get work done here, I'll take it home."
- Typical managers spend upto 80% of their day interacting with people, these could be planned to make them more productive.

WHAT IS AN OBJECTIVE ?

An objective is :-

- A sharp, precise prediction about a state of affairs you wish to exist at a set time in the future following an interaction.
- A statement articulating the outcome you want for a situation.
- In business interactions, objectives usually refer to agreeing, planning or deciding things.

Usually has 2 elements,
- a description of the outcome that you want. (desirable & realistic)
- some standard by which to measure success.

BENEFITS OF SETTING OBJECTIVES

- Clarifies what you have to DO.
- You can compare the outcome with the prediction & guage your success.
- Having a stated objective helps you to communicate to others what you want to achieve.

If we can analyse interactive behaviour, then our behaviour & other's behaviour may be monitored. We can plan to try & adopt a particular style of behaviour as is most appropriate to achieve our objective(s).

Planning WIN : LOSE transactions is a misuse of the skills of interaction. Planning WIN : WIN transactions is more acceptable.

Common categories of interactive behaviours to be identified are :

- proposing,
- suggesting,
- building,
- seeking proposals / suggestions,
- disagreeing
- supporting
- difficulty stating
- seeking clarification

There are other identifiable behaviours.

(Acknowledgement to P. Honey)

Avoid ….
- Having 'overall objectives' (too large) & not just ones for this interaction.
- Not specifying standards of success.
- Failing to distinguish between 'activities' & 'objectives' relating to the interaction.
- Objectives unrelated to the real situation in prospect.

USING INTERACTIVE SKILLS

* OPENING PREMISES
* BEHAVIOUR SHAPING
* FACTORS REDUCING EFFECTIVENESS
* CHANGING ANOTHER'S BEHAVIOUR

OPENING PREMISES

- We start from the interactive situation itself & the end-of-interaction objectives.
- There is no conflict or power struggle if both participants have equivalent objectives. → 'In-step' behaviour
- Most agree there is a link between one person's behaviour and another's.
- You can 'arrange' your outward behaviour to influence or 'shape' another during interactions.
- You may do it consciously or unconsciously.
- Only other person's overt behaviour is accessible to judge our effectiveness.
- Interactive skills are more effective in 1:1 than in 1: many interactions.

BEHAVIOUR SHAPING

- Behaviour shaping is a 2-way process so you may be 'shaped' by the other person.
- The language of the interaction also flags the behaviours.
- Our behavioral activity commonly triggers a particular response in reply → eg. 'disagreeing' - 'disagreeing' spirals may lead to a slanging match.
- We should discipline our own behaviour to single-category-at-a-time to avoid muddling the other person.
- We are only effective if the other person is listening adequately.
- Some behaviours are more 'powerful' shapers than others in seeking a predictable reaction →
  - Seeking suggestions/proposals,
  - Suggesting,
  - Proposing,
  - Building,
  - Seeking clarification.

  (see S.301b for list)
- It can be mutually beneficial when dealing with an unskilled person eg. interviewer with an unskilled interviewee.

FACTORS

- Shortage of time for the interaction.
- Conflicting objectives.
- Where emotions are roused.

CHANGING BEHAVIOURS

In planned interactions which are predetermined, detailed & action-oriented to achieve an objective :-

- Observe the other's behaviour.
- Feed back observations to them so they are aware of the behavioral characteristics.
- Help them plan a change.
- Leave them to stick to the plan.
  - be supportive, if necessary → eg. counselling
  - don't offer support → eg. dieting to slim

COUNTERING ANOTHER'S 'SHAPING' BEHAVIOUR

- Advance your ideas as 'suggestions' rather than 'proposals'.....'supporting' is a likely outcome.
- Always conclude with a 'shaping' behaviour to retain control of a conversation eg. a 'suggestion' or 'seeking clarification'.
- To avoid 'disagreeing' or 'difficulty stating' try 'building' behaviour. Building often begets building as seen in brainstorming sessions.
- To encourage conversation try 'building' or 'seeking suggestions' - further encouraged by verbal & non-verbal support.

SOLVING PERFORMANCE PROBLEMS

* WHAT IS MEANT BY 'PERFORMANCE' ?
* QUESTIONS ABOUT PERFORMANCE DISCREPANCY
* COPING WITH SKILL DEFICIENCIES
* HOW TO IMPROVE PERFORMANCE
* THE IMPORTANCE OF FEEDBACK

PERFORMANCE
- An act which can be observed & measured.

PERFORMANCE DISCREPANCY
(Desired Performance) – (Observed Performance) = Performance discrepancy
⇒ PROBLEMS (?)

PROBLEM = Factors causing discrepancy.

PERFORMANCE DISCREPANCY
- Is it important ?
- To whom does it matter ?
- Is it a SKILL DEFICIENCY ?

IS IT IMPORTANT ?
- What does it cost in
  - wasted time ?
  - wasted money ?
  - wasted materials ?
  - damage to people or equipment ?
- What may be the annual cost ?

WHO CARES ?
- Does it bother the organisation ?
- Does it bother the individual ?
- Who is interested ?

MAKE THEM INTERESTED
- Help them evaluate their performance.
- Reward good performance.
- Increase pride in performance.
- Ensure added job satisfaction.

IS IT A SKILL DEFICIENCY ?
- If payment were generous enough, would the performance discrepancy disappear?

'YES' — NOT a skill deficiency.
'NO' — a skill deficiency.

COPING WITH SKILL DEFICIENCIES
- Simplify the job by altering:
  - the job itself,
  - the tools used,
  - the administration,
  - the job requirements.
- Provide performance aids
- Were they ever able to do the job ?

NO ? – solution lies in training.
YES ? – more frequent practice,
– more instruction,
– use performance aids.

SOLVING SKILL DEFICIENCIES
- Have they the capability to perform? Physical ? Mental ?
- YES ? – provide instruction &/or performance aids.
- NO ? – teach prerequisites,
  – restructure job.
- STILL NO ? – transfer to another job or dismiss them.

FEEDBACK
- Knowledge of one's performance will motivate the employee.
- Possibly through self evaluation.
- Ideally from/through one's superiors.

HOW TO IMPROVE PERFORMANCE
- Performance may be improved by attending to :
  - improving organisation
  - improved planning
  - "non-skill" factors

PERFORMANCE AIDS
- Reduce the complexity of the job.
- Give more information concerning the job.
- Means less to remember.

IMPROVING PERFORMANCE – CONSIDERING NON-SKILL FACTORS
- Do you inadvertently.....
  'PUNISH' good performance ?
  'REWARD' bad performance ?

– Ignoring H. & S. procedures may increase output & pay. (Countered by condemnation.)

– Through non-recognition by superiors.
– Social disapproval among peers.
(Countered by reducing punishments & increasing incentives.)

IMPROVING PERFORMANCE THROUGH PLANNING
- Provide good eqpt., maintenance & spares.
- Improve work methods.
- Improve mgt. supervision & assistance.
- Revise responsibilities.
- Replan work stations, lighting, ventilation, etc.
- Remove obstacles to good performance.

IMPROVING PERFORMANCE THROUGH IMPROVED ORGANISATION
- Routine jobs often lower interest.
- Countered by using,
  - job rotation,
  - job enlargement,
  - job enrichment,
  - group work,
  - autonomous work groups

Groups of employees plan & organise their own work.

PERFORMANCE SYSTEM

* WHAT IS MEANT BY THE PERFORMANCE SYSTEM ?
* THE PERFORMANCE SYSTEM MODEL
* PERFORMANCE DISCREPANCIES.

THE PERFORMANCE SYSTEM refers to a circumstance where we have :-
- A situation,
- A response,
- A consequence, &
- Feedback.

THE SITUATION encompasses
- The immediate environment
  - location ; resources; working conditions; tool & machinery; etc.
- The specification to be worked,
  - instructions; responses; expectations; standards ; etc.

RESPONSE by the performer.
- The behaviour of the employee; his/her actions.

FEEDBACK
- To the performer.....
- About the consequences.

FEEDBACK may come :-
- From the organ^n. ; superior; peers or others (often delayed).
- From the performer by self-evaluation (more immediate).
- From the environment eg. meters, dials, customers, sales, etc. (quite rapid).

A **CONSEQUENCE**
- Of the response to the situation.
- Of the response upon the organ^n. which may be +ve (valued) or -ve (detrimental).

THE PERFORMANCE SYSTEM MODEL
- Ideally would have all four functions operating well.
- Often individual functions or parts may not operate correctly.
- Enables an objective look to be taken at performance problems to classify performance discrepancies and make diagnoses.

PERFORMANCE DISCREPANCIES
- May be due to deficiencies in :-
  - the individual (usually <1%)
  - the environment (near 80%)
  - the knowledge (about 20%)
  - a combination of these.

THE KNOWLEDGE
- Does the employee know
  - when to respond ?
  - how to respond ?
  - what deficiency he/she has?

THE ENVIRONMENT
- Look at the specifications & standards
- Is the problem a lack of feedback ?
- Is it an interference in the physical environment?
- Examine the +ve. & -ve consequences

Identify the Performance Discrepancy.
- Are standards realistic ?
- Are they perceived as achievable?
- Are they administered sensitively & consistently ?

(Over-performers need attention as do under-performers. Could benefit whole org^n.).

- Are employees assuming their own standards?
- Are they at variance with the organisation?
- Is data being redistributed in a useful format?
- Is feedback accurate & frequent ?

Are they formal or informal consequences ? People seek +ve consequences as they perceive them. Are they +ve for the organisation too ?

Task interference takes many forms, especially in a bureaucracy. Minor irritations assume major proportions costing a disproportionate amount of time to correct relevant to their imporance.

PERFORMANCE AIDS

* WHAT IS A PERFORMANCE AID ?
* TYPES OF PERFORMANCE AID
* ACTIVITIES - LEVELS OF DIFFICULTY
* WHEN TO USE PERFORMANCE AIDS
* HOW TO SELECT PERFORMANCE AIDS

WHAT IS A PERFORMANCE AID ?

- Performance aids reduce the performance discrepancy between the desired and observed performance of employees.
- Performance aids have expected beneficial outcomes.

BENEFICIAL OUTCOMES

- Reduces the amount of instruction required.
- Reduces the cost of instruction.
- Reduces development time & effort to produce the desired performance.

TYPES OF PERFORMANCE AID

3 types designed to :-

- REDUCE the COMPLEXITY of the job.
- Gives the operator MORE INFO^{N} on the job.
- REDUCES the possibility of FORGETTING.

For REDUCING FORGETTING

- CHECKLISTS - ensure the completion of a performance eg. shopping list.
- LABELS - reminders of what to do eg. 'sound horn'
- DIAGRAMS - symbolic description of a process eg. wiring diagram.
- MEMORY DEVICES - recall information which must be remembered eg. 'cut out & post'

For REDUCING COMPLEXITY

- MENTAL PRE-PACKS reduce the need for mental work eg. calculators, etc.
- PHYSICAL PRE-PACKS reduce the need for physical effort eg. printed forms, self-adhesive labels, etc.

For improving on INADEQUATE INFORMATION

- SIGNALS - focus attention on important details.
- RESTRAINTS - interrupt performance to check all is well eg. safety catch.
- RULES - simplify the issue for the performer eg. 'no smoking'
- CLARIFIERS - make information clearer eg. colour coding.
- FEEDBACK METHODS - compare performance against set standards eg. templates.

SELECTING PERFORMANCE AIDS

- Use the flowchart (A.2001) itself a performance aid. Possibly more than one aid might be useful.

- Identifies the most appropriate type of P-A to use, and also
- How many P-A's might conveniently be used for a specific task. (Combinations of P-A's are acceptable)

WHEN TO USE PERFORMANCE AIDS

- First identify the level of difficulty of an activity.
- Activities at levels 1 & 2 are helped by performance aids.
- Activities at levels 3, 4 & 5 need performance aids & further instruction.

ACTIVITIES - Levels of Difficulty

1. Can already perform it.
2. Easy.
3. Moderately difficult.
4. Difficult.
5. Very difficult & complex.

PAPERS :-
A.2001 - PERFORMANCE AIDS - FLOW CHART FOR SELECTION.

PERFORMANCE SITUATION APPRAISAL

* WHAT IS PERFORMANCE SITUATION APPRAISAL ?
* DATA-BASED POTENTIAL
* IDENTIFYING OPPORTUNITIES FOR IMPROVEMENTS

PERFORMANCE SITUATION APPRAISAL is where you appraise performance to recognise :-
- discrepancies in performance,
- areas of concern,
- to identify opportunities, &
- identify threats.

P.S.A. is more effective when it can be made on sound, numerical data.

DATA-BASED POTENTIAL
- Indicates potential for improvement.
- May be positive or negative → • Positive potential may refer to an increase in productivity. • Negative potential might refer to a decrease in costs.
- Potential improvements < 10% usually not worth looking at.
- Potential improvements > 50% are worth examining for benefit of organ^{n}.

IDENTIFYING OPPORTUNITIES
- There is the need to have identified both normal (average) & exemplary performances.

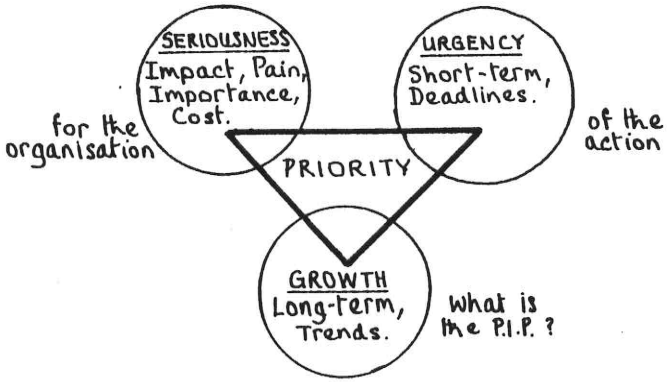
➤ RATIO of $\frac{\text{Exemplary Performance}}{\text{Average Performance}}$ = Performance Improvement Potential (P.I.P.) →
- P.I.P. < 1·1 not worth remarking.
- P.I.P. > 1·1 take note.
- P.I.P. > 1·5 study in detail.

➤ If negative values are important → $\frac{\text{Av.Perf.}}{\text{Exem.Perf.}}$ = P.I.P.

* **AREAS OF CONCERN** →
  - May often be subdivided into sub-concerns of 'bite-sized chunks.'
  - Initially demotivating if client sees only more problems emerging.
  - In the short term it takes longer.
  - In the long term it is more effective.

→ **QUESTIONING TO CLASSIFY AREAS OF CONCERN**
- which one ..... ?
- be more specific about ..... ?
- just what are we talking about ?
- unscramble this .....
- what are the component pieces?

* **RANKING CONCERNS IN ORDER OF PRIORITY**. Try to assess in cash terms the gain or loss because of this performance.



* **WHEN TO USE PERFORMANCE SITUATION APPRAISAL**
  - To improve current levels of performance when :-
    - there is wide discrepancy between the performance of individuals.
    - performance levels are not improving.
    - people behave as they do.
  - To institute new policies :-
    - to predict performance.
    - to anticipate problems.
    - to construct a plan.

PERFORMANCE MANAGEMENT

* WHAT IS PERFORMANCE MANAGEMENT ?
* INFLUENCING COLLEAGUES & SUBORDINATES
* REMOVING OBSTACLES

PERFORMANCE MANAGEMENT
- The art of dealing with people to influence their ideas & behaviour to achieve a desired performance.

PERFORMANCE MANAGEMENT is an important management technique tool to be used at all times when a manager is:
- identifying,
- solving,
- monitoring &
- evaluating performance problems.

INFLUENCING PEOPLE
- There is the need to be sure that what you do/say has a GOOD INFLUENCE on others.
- The main features are:
  - the POSITIVE RESPONSE
  - being a MODEL
  - provide PUNISHMENT

POSITIVE RESPONSE means motivating others by:
- being polite, pleasant, patient, praising.
- verbally rewarding good performance.

PEOPLE REACT FAVOURABLY TO POSITIVE RESPONSES

MODELLING

To gain respect & have his opinions valued, the manager must MODEL the right behaviour he desires eg.
- Be a good timekeeper,
- wear safety clothing,
- observe regulations, etc.

PEOPLE IMITATE THE BEHAVIOUR OF OTHERS

PUNISHMENT (an unsatisfactory alternative)

This does not mean inflicting pain or harm but an action which causes dissatisfaction or discomfort. Beware of possible side effects and negative consequences....
- on the person,
- on the group.

Should be used infrequently & sensitively. Must be accompanied by an explanation of why it is being 'inflicted.'

OBSTACLES hinder the achievement of desired performance.
OBSTACLES:- cause irritation, & reduce willingness to perform.
OBSTACLES:-
- concern mgt. & organisation,
- concern things

THINGS eg.
- faulty equipment,
- shortage of materials, etc.

MANAGEMENT & ORGANISATION
- too much paperwork,
- too little information,
- understaffing, etc.

HOW TO TREAT OBSTACLES
- Ignore them,
- Go round them,
- Go over them,
- Remove them,
- Neutralise them,
- Buy them off,
- Demolish them,
- Overcome them,
- Turn to your advantage,
- Alter them,
- Wait until they go away,
- Prove they don't exist.

REMEMBER !

PEOPLE TEND TO IMITATE MODELS THEY RESPECT.
PEOPLE TEND TO IMITATE MODELS THEY SEE BEING REWARDED.
PEOPLE TEND NOT TO IMITATE MODELS THEY SEE BEING PUNISHED.

JOB MODELLING (FUNCTION MODELLING)

* WHAT IS A JOB MODEL ?
* DEVELOPING A JOB MODEL
* PROBLEMS OF ESTABLISHING JOB MODELS

A JOB MODEL analyses a job to specify :-
- its purpose,
- its component parts,
- the relationships of the component parts,
- the performance standards.

PROBLEMS OF ESTABLISHING JOB MODELS

Not straightforward because :-
- jobs are not well defined,
- accomplishments are unclear,
- standards may not exist.

Information on one or more of these pointers, where they exist, may be unreliable.

DEVELOPING A JOB MODEL
- Identify the 'outcomes' of the job
- Reduce outcomes to 'duties'
- Identify requirements for each duty
- Identify performance indicators for each duty
- Identify standards of success for each duty

Not the behaviour of the performer !

OUTCOMES
- Reflect the end results &/or what is left behind on completion of the job.
- What would be the outcome of this job disappearing ?

REQUIREMENTS
- Quality → complaints; accuracy; lacking waste; downtime; etc.
- Quantity → rates; volumes; times; complaints; etc.
- Costs → labour; materials; indirect costs; etc.

(Should be number based where possible.)

IDENTIFY STANDARDS
- What historical data is available ?
- What deviations are permitted ?
- What performance for each measure of success ?
- What norms are you taking ?

PERFORMANCE INDICATORS
- What information is needed to do this ?
- How do you know if you are failing or succeeding ?
- Have quality, quantity & cost been considered ?

PERFORMANCE PYRAMIDS

* WHAT IS A PERFORMANCE PYRAMID ?
* WHAT IS A PERFORMANCE OBJECTIVE ?
* WHAT ARE SUBORDINATE OBJECTIVES ?

- Plotting PERFORMANCE PYRAMIDS is a technique to analyse performance objectives to identify any discrepancies which may prevent a person achieving the performance objective.

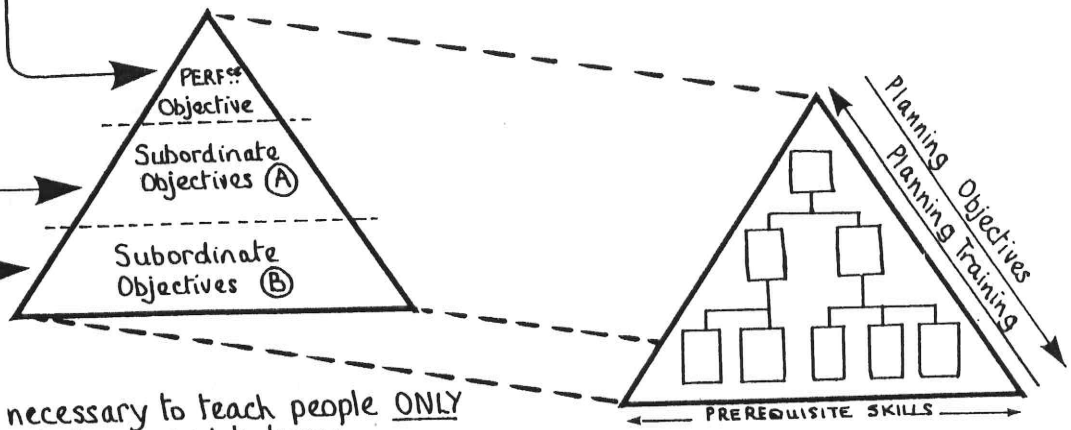
PERFORMANCE DISCREPANCIES may be the result of inadequate skills or knowledge.

- The P.P. is a useful planning tool for training managers to fit people into training programmes i.e. help identify target groups for skills training, etc.
- May be drawn physically for complex objectives, or solved mentally for more simple objectives.

A PERFORMANCE OBJECTIVE is :-
- the apex of the pyramid,
- the terminal objective/behaviour,
- the task job to be achieved.

SUBORDINATE OBJECTIVES
- Skills or knowledge which needs to be mastered or acquired to achieve the performance objective.
- Having identified them, the order in which they are mastered/acquired is unimportant.

- If the order is important then the sub-objectives belong on different levels eg. sub-objs. (B) are lower than sub-objs. (A)



* IDENTIFYING TRAINING NEEDS

It is necessary to teach people ONLY
- what they need to know,
- what they do not already know,
- what they are capable of learning.

Any extra, any alternative is :-
- not cost effective,
- may not motivate the trainees.

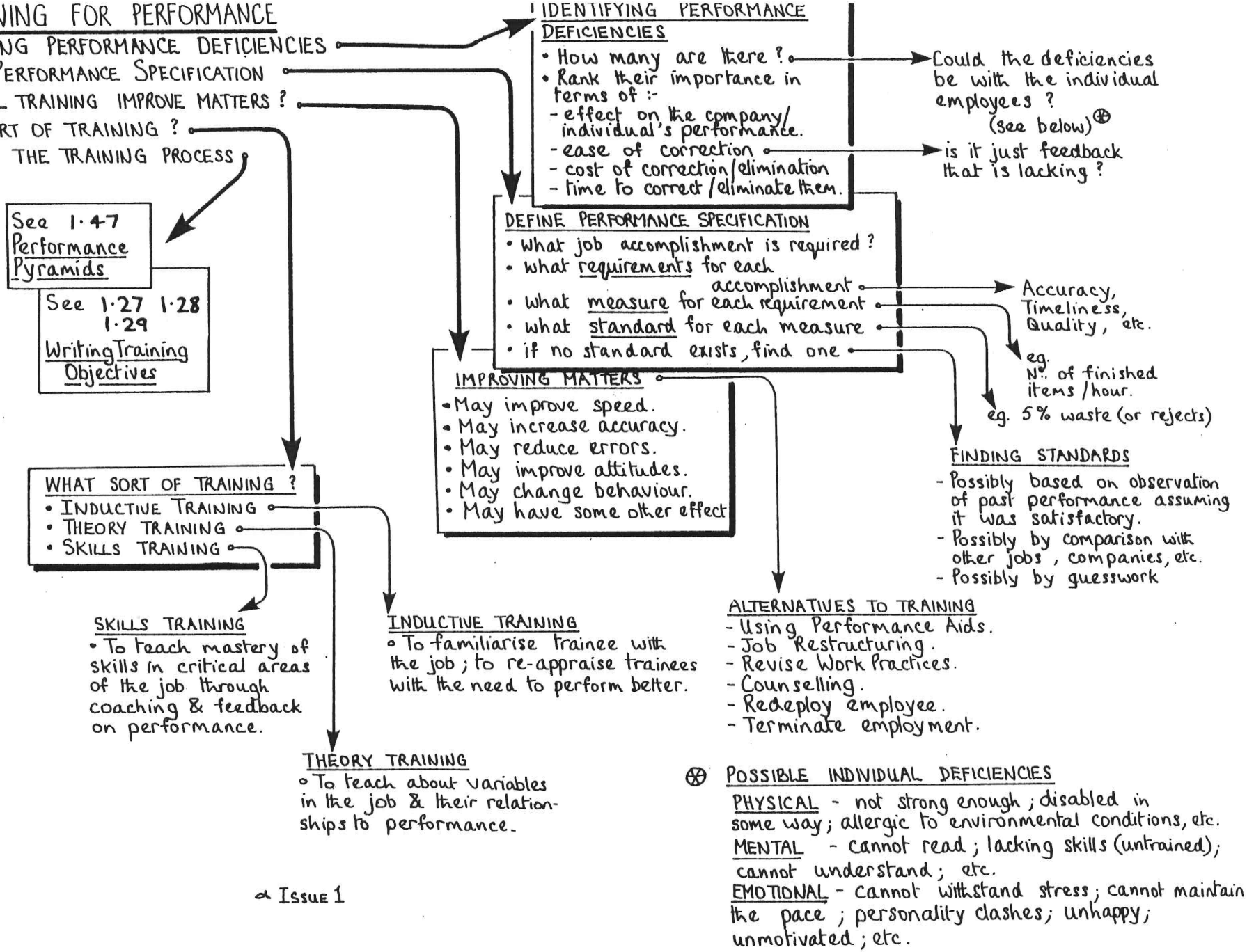
* SUBORDINATE OBJECTIVES - LEVELS OF DIFFICULTY

1. Can already do it.
2. Easy.
3. Moderately difficult.
4. Difficult
5. Very difficult & complex.

Where trainee has basic competence (level 1) :-
- PRE-REQUISITE skills/knowledge define where the performer needs competence if he/she is to benefit from training. (The pyramid base).
- ENTRY LEVEL skills/knowledge are what the performer has when commencing instruction.

TRAINING FOR PERFORMANCE

* IDENTIFYING PERFORMANCE DEFICIENCIES
* DEFINE PERFORMANCE SPECIFICATION
* HOW WILL TRAINING IMPROVE MATTERS ?
* WHAT SORT OF TRAINING ?
* STARTING THE TRAINING PROCESS



⊛ POSSIBLE INDIVIDUAL DEFICIENCIES

PHYSICAL - not strong enough; disabled in some way; allergic to environmental conditions, etc.

MENTAL - cannot read; lacking skills (untrained); cannot understand; etc.

EMOTIONAL - cannot withstand stress; cannot maintain the pace; personality clashes; unhappy; unmotivated; etc.

JOB ACCOMPLISHMENTS

* WHAT ARE JOB ACCOMPLISHMENTS ?
* HOW DO YOU IDENTIFY JOB ACCOMPLISHMENTS ?
* HOW DO YOU MEASURE JOB ACCOMPLISHMENTS ?

WHAT ARE JOB ACCOMPLISHMENTS ?

- They define what is important in carrying out a job → could be one accomplishment - commonly fewer than six.
- They should reflect end results and NOT activities.
- Can be divided up into sub-accomplishments → logically related but different to accomplishments in the scope or degree to which they describe the job.

IDENTIFICATION OF JOB ACCOMPLISHMENTS

- Examine existing job to determine how it is being done now.
- Look at broader organisational setting eg. goals, structure, work & info. flow.
- Determine how the job should be carried out ..... ideally.

CONSIDERATIONS

- Job mission → - a specific task, - a task which gives sense & direction to people's efforts.
- Economic characteristics → How does the job contribute to this ?

Job as it should be (viewed) ↓ — ORGANISATION / DEPT. / JOB / BEHAVIOUR — ↑ Job as it is (viewed)

MEASURING ACCOMPLISHMENTS

- Establish the requirements / dimensions to be used in order to determine whether the job is being performed well or poorly.
- Establish standards.

STANDARDS OF ACCOMPLISHMENT

are levels to which we would expect the job to be performed.
Expressed as :-

- Numeric → - 3 new accounts / month; - 80 widgets per hour
- Narrative → - In a form similar to the following :., ...

UNITS OF MEASUREMENTS

Establish a unit of measure with which to express the requirements.

QUANTITATIVE

- Cost per unit.
- Units per hour.
- % of job covered measured by :-
  - labour, - volume,
  - rate, - material,
  - timeliness, - management.

QUALITATIVE

- Rating of originality.
- Novelty.
- Class.
- Accuracy - Rate, - Error

VALUE ANALYSIS

* WHAT IS THE CUSTOMER REQUIRING ?
* WHAT DOES THE MANUFACTURER WANT ?
* DEFINITION OF VALUE
* WHERE DO WE BEGIN ?
* PLANNING THE ANALYSIS
* DESIGN CONSIDERATIONS

THE CUSTOMER WANTS .....
an item which is :-
- Functional,
- Aesthetically satisfying, at
- An acceptable price.

If all 3 are correct, the product is a go-er.

MANUFACTURER WANTS :-
- Equivalent performance from lower production costs.

DEFINITIONS OF VALUE - Which one ?
- COST VALUE - sum of labour, materials, etc. used in the production of the article.
- EXCHANGE VALUE - properties or qualities which enable us to exchange it for something else.
- ESTEEM VALUE - properties or qualities, features & attractiveness which make us want to own it.
- USE VALUE - properties or qualities which accomplish a use, do work, or give service.

WHERE TO BEGIN ? With the help of the customer's specification, ask :-
- What is this item ?
- What does it do ?
- Is it required ?
- What does it cost ?
- How many are used ?

→ Ask these questions of :-
- the component parts,
- the sub-assemblies,
- the whole product.

PLANNING THE ANALYSIS
You will need .....
- A clear statement of the problem (as far as it is understood.)
- An agreement on the OBJECTIVES of the analysis.
- What RESTRICTIONS limit the analysis.
- With whom to LIAISE (have they been informed ?)
- Feedback &/or info^n. requirements

→ **INFORMATION REQUIREMENTS**
- Principles of design objectives.
- Detailed analysis of manufacturing costs.
- Scrap & rework statistics.
- Service & reliability statistics.

- Assess overheads.
- Assess output characteristics - (fitting & assembling)
- Assess material characteristics - (per component)
- Assess material waste & rework.

DESIGN CONSIDERATIONS
- Better design may alleviate production, capacity, material, labour & other costs.
- Consider existing specifications but
  - alternative materials &/or
  - alternative processes.

Contents

PART 1 INDIVIDUAL & PERSONAL SKILLS

A Model for Assertion Training 1	2.01
A Model for Assertion Training 2	2.02
Your Personality as a System	2.03
Personality Sub-systems & Transactions	2.04
Talking with Subordinates (Orders, grievances, etc.)	2.05

PART 2 MANAGERIAL SKILLS

Team-building for Senior Managers 1	2.06
Team-building for Senior Managers 2	2.07
Another view of Team-building 1	2.08
Another view of Team-building 2	2.09
The Business of Winning	2.10
Aspects of Boundary Management	2.11
Becoming an Expert	2.12

PART 3 MANAGEMENT DEVELOPMENT

Towards Developing Managerial Effectiveness	2.13
M.D.& Implications for Managerial Choice 1	2.14
M.D.& Implications for Managerial Choice 2	2.15
Choosing a Learning Method for M.D.	2.16
A Strategy for M.D.	2.17
Demands, Choices and Constraints	2.18
Development Training for Managers (using the outdoors)	2.19

PART 4 TRAINING & LEARNING

Investigating Learning Style 1	2.20
Investigating Learning Style 2	2.21
Looking at Distance Learning Systems 1 (Co perspective)	2.22
Looking at Distance Learning Systems 2 (Prod perspective)	2.23
Towards Experiential Learning	2.24
Behaviour Modelling for Supervisory Training	2.25

PART 5 MARKETING

Market Share & Segmentation	2.26
Factors in Evaluating Sales Promotions	2.27
Planning a Promotion	2.28
Sales Promotion	2.29
S.P.Techniques - Self-Liquidating Premiums	2.30
The Role of Colour in Selling	2.31

PART 6 ADVERTISING

Advertising 1 - Setting Objectives	2.32
Advertising 2 - Principles of Advertising	2.33
Writing Advertising Copy 1	2.34
Writing Advertising Copy 2	2.35
Writing Advertising Copy 3	2.36

PART 7 INDUSTRIAL RELATIONS

Basics of Negotiating	2.37
Aspects of Negotiating	2.38

PART 8 STRESS & PERSONNEL MANAGEMENT

Educating to Counter Stress	2.39
How the Company can Alleviate Stress	2.40
Coping with Stress at Work	2.41
Stress and Women Managers	2.42
Practices to Reduce Stress	2.43
Recruitment Interview Procedures	2.44

PART 9 PERFORMANCE

Dealing with Poor Performers	2.45
Counselling the Poor Performer	2.46
The Case for Performance Engineering 1	2.47
The Case for Performance Engineering 2 - Conditions for Human Competence	2.48
Improving the Potential of Company Training Activities	2.49
Alternatives to Training to Improve Performance	2.50

PART 10 KEYWORD INDEX

Keyword Index	p 51-55

A MODEL FOR ASSERTION TRAINING 1

* PREREQUISITES FOR ASSERTIVE BEHAVIOUR
* PREPARATORY TRAINING
* CORE SKILLS

PREREQUISITES – A positive self concept ie.
- A belief in oneself and one's worth as a person.
- To have identified a basic set of personal rights (human & role) with which to align oneself.

PREPARATORY TRAINING
- Develop one's Self Concept/Esteem/Confidence.
- Articulate a set of personal rights in which you believe & which you want others to accept.

- Your perceived self concept comes mainly from others who judge you against society's norms.
- Your self evaluation influences most areas of your behaviour sometimes denying yourself personal growth

- Poor self evaluation creates a negative self image & inhibits assertive behaviours.
- Improve self evaluation by examining your strengths, skills & accomplishments & listing them in 'boasting' positive sentences

- Share them with others &/or
- Regularly list, read or recite them. (Self concept building)

CORE SKILLS
- Verbal skills
- Non-verbal skills
- Cognitive assertion

Appropriate VERBAL SKILLS require the verbal exchange of information saying what you want to say assertively eg.
- Include "I" statements, &
- 'Co-operative' words, while .... observing the other person's rights to courtesy & respect.

COGNITIVE ASSERTION - examining how you feel & what you think eg.
- requires blocking of negative unproductive thoughts produced by
  - anxiety,
  - fear,
  - lacking competence,
  - lacking self-confidence.
- promoting positive thinking in terms of a positive self image acquired by boosting self confidence.

INCORPORATED NON-VERBAL SKILLS
- Controlling one's voice eg.
  - quality : tempo
  - loudness : pitch
- Controlling body language eg.
  - gesture : posture, etc.
- Appropriate 'social' characteristics eg.
  - touching : proximity
  - dress : presentation, etc.

NB. Must co-ordinate n-v skills with verbal comm: to prevent sending confusing counter signals

* RECOMMENDED TECHNIQUES
  - EXPERIENTIAL – analysing situations,
  - BEHAVIOUR MODIFICATION – role play,
  - RATIONAL-EMOTIONAL – modelling.

IMPROVE SELF CONFIDENCE by setting yourself realistic & achievable goals.

Issue 1

2.01

A MODEL FOR ASSERTION TRAINING 2

* ASSERTIVE BEHAVIOUR
* ASSOCIATED THEORY
* ALTERNATIVE RESPONSE CONTINUUM.

DEFINITION :- 'Assertive behaviour is self expression through which one stands up for one's own basic human rights without violating the basic rights of others.' (Jakubowski-Spector 1973)

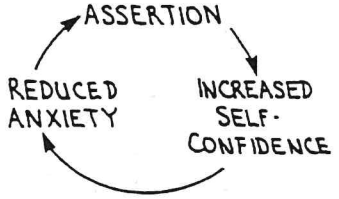
ASSERTIVE BEHAVIOUR

- Is not only associated with conflict situations nor with 'getting your own way'.
- Has positive & negative uses in social, professional & personal interactions.
- Self confidence feeds on itself through assertive action
- Assertion is self reinforcing.

ASSOCIATED THEORY

In conjunction with CORE SKILLS ....

- Includes study of alternative response patterns
- Makes transfer of skills to other situations more possible.

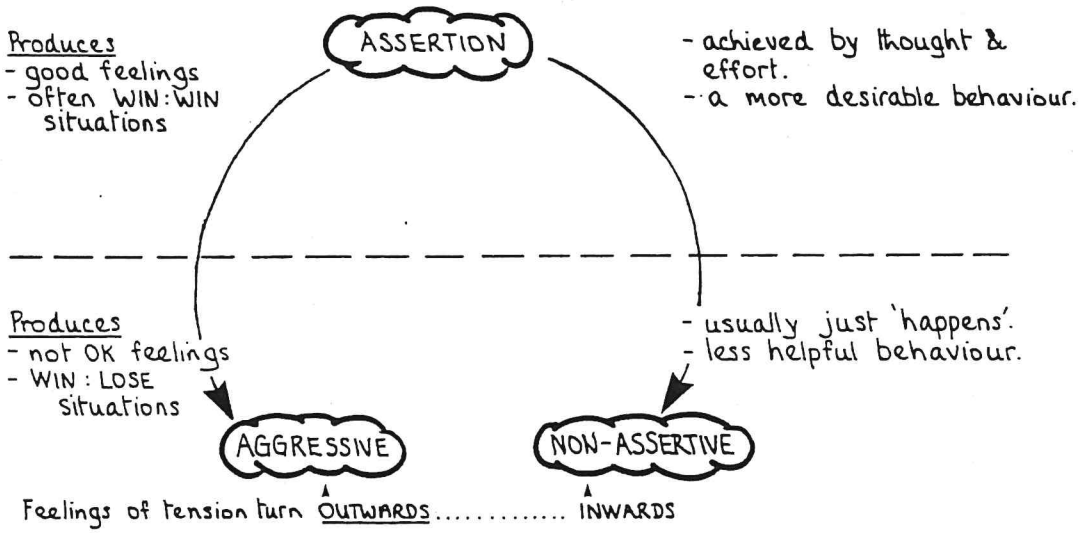


eg.
- assertive responses,
- non-assertive responses,
- aggressive responses.

- The ability to say 'YES' or 'NO' with confidence.

ALTERNATIVE RESPONSE CONTINUUM

APPROPRIATE RESPONSE PATTERN



IN-APPROPRIATE RESPONSE PATTERNS

* POSSIBLE OUTCOMES (of assertive behaviour)

SHORT TERM - Confusion in one's closer associates as behaviour patterns fluctuate.
LONG TERM - Increased self confidence

ISSUE 1

YOUR PERSONALITY AS A 'SYSTEM'

* PERSONALITY & BUSINESS PROBLEMS
* INDIVIDUALS AS SYSTEMS
* INDIVIDUAL PERSONALITY SUBSYSTEMS

PERSONALITY & PROBLEMS

- Most difficulties & lingering problems within organisations are 'people' problems.
- Every employee has a unique personality - the sum of their life experiences.
- Personalities (- not persons) communicate. (transact).
- The transactions (message & response) may cause problems leading to misunderstanding.

INDIVIDUALS AS SYSTEMS

- This system has parts (personality sub-systems), boundaries, structure, inputs & outputs, communicating across boundaries.
- Individuals cannot be considered as a wholly rational system, irrational behaviours complicate it.
- Individual behaviour is a paradox, with no solution.
- There are features common to individuals (systems)

COMMON FEATURES

- Thinking abilities enabling them to reason, be intuitive, have fantasies, create new ideas
- Experience emotions

· Artistic upbringing encourages experiencing emotions > logical reasoning. May later use reason to excuse an emotional decision.

· Technical upbringing encourages logic & reasoning > emotions.

PERSONALITY SUB-SYSTEMS

At any moment, your personality could reflect one of 3 states. You may move from one state to another in moments. They are:-

- PARENT
- ADULT
- CHILD

'CHILD' State

- Provides your emotions, feelings, basic drives & energy.
- Stays with you through life, you don't grow out of it - ever.
- It is basically 'what you are.'

'PARENT' State

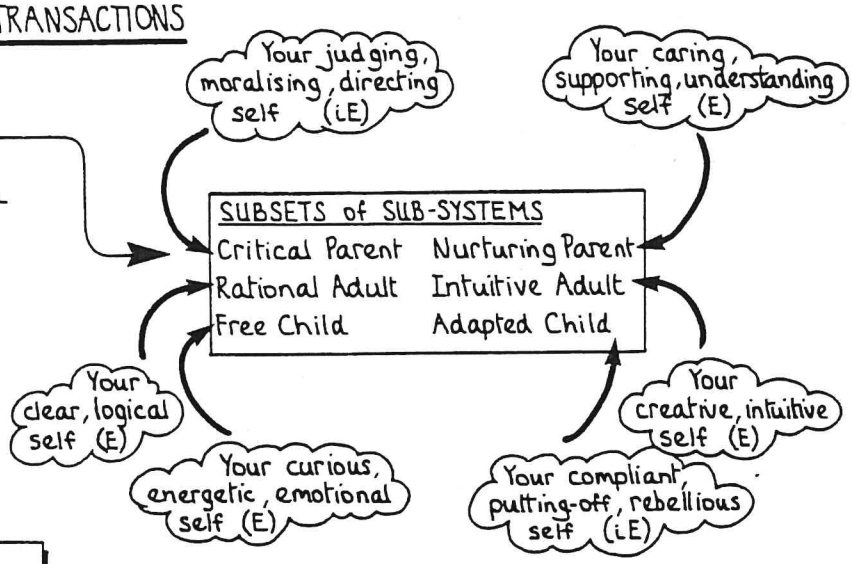
- Your taught personality.
- Attitudes, feelings, beliefs, accumulated during childhood & adolescence.
- Implanted attitudes help control you. Save you having to re-think every situation.

'ADULT' State

- Computer-like, it collects facts, makes decisions & solves problems.
- Reasonable & reasoning, it is logical & unemotional.
- Helps control you & your actions.

PERSONALITY SUB-SYSTEMS & TRANSACTIONS

* SUBSETS OF PERSONALITY SUB-SYSTEMS
* IDENTIFYING YOUR OPERATIONAL SUB-SYSTEMS
* WHAT IS A TRANSACTION ?
* LIFE POSITIONS & TRANSACTIONAL PERSONALITIES

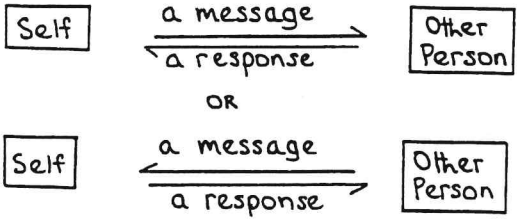


E = Effective.
iE = inEffective.

OPERATIONAL SUB-SYSTEMS

- You may change from one 'self' to another 'self' in an instant.
- It is usually an unconscious change but it could be usefully contrived to control situations.
- Each 'self' is characterised by :- - the words you use, & = the body language you display..... in the course of transactions.

A transaction implies :-



In a transaction one of your personalities hooks one of another person's personalities & initiates a response.

- People in Field 'A' probably use effective 'selves' eg. ADULT or NURTURING PARENT in transactions. They make effective managers.
- Field 'C' people feel confined & aimless. Use ineffective 'selves'.
- To maintain OK transactions, communicate from your effective personalities. Respond with your effective personalities.
- Communication from effective personalities seems to draw out positive responses from others. ⇒ OK transactions.

4 life positions

I'm OK, You're OK (A)	I'm OK, You're NOT OK (B)
I'm NOT OK, You're OK (D)	I'm NOT OK, You're NOT OK (C)

* OPEN & HIDDEN TRANSACTIONS

- People often communicate with two personalities at a time.
- Open transaction - uses one personality, communicates in words.
- Hidden transaction - uses different self, communicates sub-consciously by eye mov't, attitude, tone, body-language, etc.
- Simultaneously the respondent 'hears' one message & 'sees' another.
- Confusion is caused the messages are not congruent.

TALKING WITH SUBORDINATES

Tx = TRANSMITTER
Rx = RECEIVER

* GIVING ORDERS.
* HANDLING GRIEVANCES OR APPRAISALS
* REPRIMANDING
* EFFECT OF PARALANGUAGE
* IMPORTANCE OF LANGUAGE

GIVING ORDERS

- What are your OBJECTIVES ?
- Allocate RESPONSIBILITY
- Consider MOTIVATION
- Consider the Rx
- What TYPE of order ?

- Are you clear about what action you want to initiate ? Will the Rx be equally clear ?
- Whom do you want to be responsible for taking the appropriate action?
- What in the context of the order or the circumstances of the Rx will make them obey?

TYPES OF ORDER

- STRONG. Direct orders or commands, unilateral statements, not negotiable.
- Indirect orders, instructions, requests or suggestions are softer commands.
- WEAK. Implied orders, pleas.

CONSIDER THE Rx

- What is their status vis-a-vis the Tx ?
- What is the complexity of the job you are requesting ?
- What is the climate for carrying out the instruction ?
  - hostile
  - friendly
  - hurried
  - stressful
  - restricted
  - etc.
- What will be the effect of this on the successful completion of the order ?

IMPORTANCE OF LANGUAGE

The vocabulary you use should be appropriate to the occasion & the participants (espc. the Rx).

- Well educated persons will use an Elaborated Code of speech.
- Less well educated are bound by a Restricted Code
- Rhythm, rate & phrasing are important too.

IMPORTANCE OF PARALANGUAGE

Paralanguage enhances speech by adding further meaning :-

- Posture & proximity,
- Facial expressions,
- Gestures & mobility,
- Body language,
- Gaze
- Inflection, stress, tone & volume imply mood too.

Collectively - they may indicate you attitude to another person.

- aggressive / argumentative / etc.
- dominant / fearing / submissive / etc.
- liking / disliking / friendly / etc.
- offering sympathy / sincerity / etc.

HANDLING GRIEVANCES or APPRAISALS

- Find out more about the subordinate beforehand.
- Choose a quiet or neutral venue.
- Develop listening & attending skills. Be patient & tolerant.
- Don't offer snap solutions.
- Don't make snap appraisals.
- Follow agreed organisation procedures (if they exist).
- Reduce stress &/or emotional 'heat'

- based on accent or dialect.
- based on heresay or 'halo' effect.
- don't pre-judge the situation or person.
- make notes of the conversation.
- promise (& deliver) follow-up action.
- don't duck issues.

REPRIMANDING

- Consider where best to administer the reprimand.
- Follow procedures for disciplinary actions.
- Be fair - listen to explanations for actions taken.
- Keep your temper & don't be provoked to argue.
- Avoid sarcasm &/or abuse.
- Accept your task. Don't excuse it. Be brief & succinct.

TEAM-BUILDING FOR SENIOR MANAGERS 1

* WHY HAVE TEAMS & TEAM ROLES ?
* REAL-TIME MANAGEMENT TEAMS
* WHAT TO SEEK IN A SNR. MGT. TEAM
* RECRUITMENT & SELECTION POLICIES

WHY TEAMS ?

- Teams are best utilised to deal with areas of high uncertainty
- Team roles act as a brake on runaway specialists.
- Teams are more effective than the sum of the abilities of the team membership.
- Teams should be formed for the task to be undertaken

- Abilities & qualities needed to start an enterprise/company/project differ from those needed to consolidate its success.

- Not routine problem solving & decision making but, for example, long-range strategic planning.

COMPLEMENTARY TEAM ROLES from Belbin's classification :-

CW Company Worker
CF Completer/Finisher

CH Chairman
SH Shaper

PL Plant
RI Resource Investigator

ME Monitor Evaluator
TW Team Worker

for Self Perception Inventory Questionnaire & Analysis see BELBIN, M. "Mgt. Teams" 1981 Heinemann pp.153-170

R. & S. POLICIES without guidance:-

- Company culture moulds a type of collective personality.
- Panels have a collective image of the person they think would 'fit in'.
- Managers tend to recruit in their own image.
- Team role qualities are seldom considered.

UNINTENDED OUTCOMES

- Possibly recruitment of persons of lower mental ability.

CORRECTED BY :-

- Graduate recruitment to produce managers with good mental abilities.
- Producing a Job Specification which identifies the team role to be filled.
- Internal recruitment of persons with a suitable 'track record'.

REAL TIME TEAMS are :-

- Commonly composed of functional office holders, & are
- Not generally selected for their team roles.

WHAT TO SEEK IN A SNR. MGT. TEAM

- A range of team role strengths & personal attributes
- A spread of mental abilities
- A good chairman
- One very creative & clever member.
- One clever, analytical member.
- No over-dependence on a single individual
- A recognition of latent weaknesses & the skill to compensate for them.

- Not necessarily well-balanced individuals as much as individuals who will balance well. Compatability of the membership is crucial to an effective team.

- Capable of recombination without loss of efficiency.

- Too many 'high fliers' is not a valuable, working combination.

- This may be OK with a small company with no alternative but is not recommended.

CHAIRMAN'S ATTRIBUTES

- Patient & commanding, who...
- Recognises & uses ability in others, & is...
- Not necessarily clever but can work with talented team members.

N.B. - Clever people need leadership of a type & style different from people less gifted.

Issue 1

TEAM-BUILDING FOR SENIOR MANAGERS 2

* PRACTICAL SUCCESSFUL TEAMS
* UNSUCCESSFUL TEAMS
* TEAM SIZES
* TEAM MEMBERSHIP FEATURES
* WHERE TO MEET

PRACTICAL SUCCESSFUL TEAMS are characterised by :-
- Developed corporate thinking, wilk..
- Fewer hazards from functional (departmental) dominance.
- Animated interactions
- Positive emphasis upon :
  - care for employees,
  - high standards, & belief in...
  - participation & consultation.

UNSUCCESSFUL TEAMS may feature :-
- An unfortunate combination of characters.
- A lack of corporate thought in favour of dept.'l interests
- Obstacles to people finding a preferred team role.
- Too many, too clever persons
- People adopting team roles out of context

- Leading to collectively produced ideas.
- An imbalance of individual qualities.
....with their abilities & characteristics.

WHERE TO MEET - important features of this environment are :-
- Room size
- Furnishing & arrangements

FURNISHINGS
- Long rectangular table are suited to hierarchically organised groups.
- Round tables discount status & seniority & improve comm^n. in teams.

ROOM SIZE
- Teams adapt to room size, possibly at expense of 'purpose'.
- Better to provide rooms to fit the 'ideal' team.

TEAM SIZES a 'team' differs from a 'group' by requiring personal adjustments to limited role demands to form an effective association.
- 8, 10 or more
- 6 (optimum)
- 4, or fewer

8, 10, or more
- group resources need organising,
- OK for 'command groups',
- too large for intimacy of involvement,
- getting too large for close interpersonal communication.

OPTIMUM 6
- each manager has own territory & overlapping responsibilities diminished.
- cooperation occurs associated with division of labour.
- competent managers can have primary & secondary team roles.

4, or fewer
- tends towards a 'leaderless group'.
- vulnerable when individuals absent.
- may become unstable in a crisis.

FEATURES OF GOOD TEAM MEMBERS
They can :-
- Adapt to fill other team roles
- Show timeliness
- Show self restraint
- Build a sense of community & common purpose
- Sacrifice personal interests to corporate interests

- Team goals greater than departmental goals.
- While still maintaining their company functional role.
- Limiting their team role ranges.
- Know when to listen & when to intervene.
- Allowing the team to explore latent resources.
- Know when to change roles (possibly indicated by changing formality/informality indicators.)
- Creating roles for others.

N.B.
Some people cannot fit into any team role & so detract from the team's performance / potential. Such 'liabilities' are to be preferred to 'wreckers' eg. those with a high capacity for spontaneous action combined with a disinclination to consult others.

ANOTHER VIEW OF TEAM-BUILDING (1)

* WHEN DOES A GROUP NEED TO BE A TEAM ?
* WHAT HAPPENS AS UNCERTAINTY RISES ?
* WHEN UNCERTAINTY FALLS

WHEN DO YOU NEED TEAMS ?
- When levels of uncertainty about the task are rising to problem proportions.
- The greater the uncertainty about task, the greater is the need to share the problem.

BUT WHY TEAMS ?
- To solve puzzles, simple or complex ?
- To solve problems ?
- To sort problems ?

Yes, because problem may have no answer.

UNCERTAINTY RISES &
- Relationships develop within group
- Communication increases in group.
- A need to share the problem increases
- The group becomes a team.

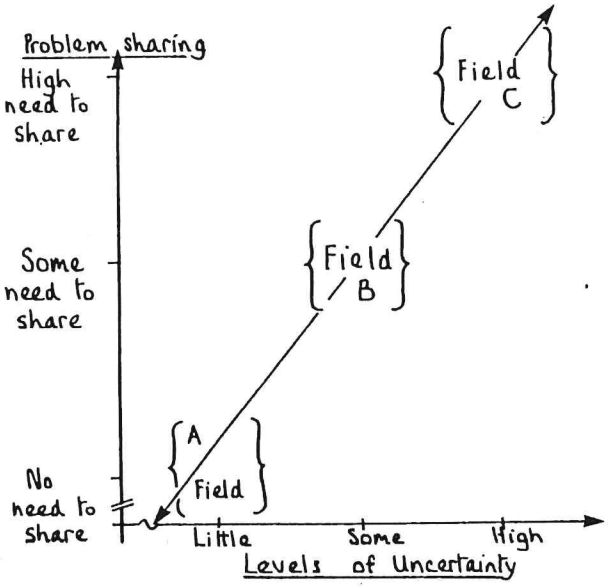
People's feelings are important.

SORT PROBLEMS into :
- those about which we can do something (planned change).
- those someone else can tackle or solve (influence them).
- problems we must 'live with' (learn to cope).

UNCERTAINTY FALLS &
- Problems are not shared as individuals may produce solutions from individual's specialist knowledge.
- Communication may not be needed ..... communication skills not important.
- Inter-personal & individual's feelings not an issue.

No - puzzles have answers. Time & persistence will find answers.
- Experts solve complex puzzles.

* LEVELS OF UNCERTAINTY & PROBLEM SHARING



FIELD A
- Simple puzzles easily solved by individuals.
- Needs polite social skills only.
- Any potential conflict is tolerated or ignored.
- Leader's role ? Not needed.

FIELD B
- More complex puzzles solved by cooperation.
- Interpersonal skills of cooperation needed.
- Conflict is possible & tolerated.
- Leader's role. ? Chairperson ; coordinator ; manager of task process.

FIELD C
- Problem solving in conditions of uncertainty needs teamwork.
- High level of interpersonal skills of openness ; trusting ; confronting ; sharing feelings & ideas ; giving/receiving feedback.
- Conflict is inevitable - a need to cope with it.
- Leader's role ? Managing team & task processes.

See also :- Another View (2) Outlines of views of D. Casey & W. Critchley - given to World Congress on Management Development - June '84

ANOTHER VIEW OF TEAM-BUILDING (2)

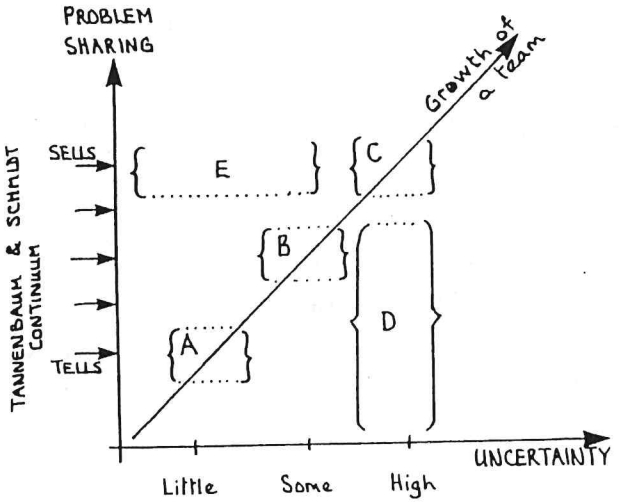
* IDENTIFYING THE FIELDS
* SAVING TIME & EFFORT
* DRAWING RIGHT CONCLUSIONS

IDENTIFYING THE FIELDS

- {A} unshared certainty.
- {B} cooperation.
- {C} shared uncertainty.

{D} & {E} to be avoided :-

- {D} Solving real problems with high levels of uncertainty with gp. members not prepared to share.
- {E} Futile activity area developing openness, trust, sharing, etc. to perform low-level puzzle solving.



TEAM BUILDING & MANAGEMENT THEORIES

FIELD C - You might look for Blake & Mouton's (9.9) character to emerge.
- Also Action Centred Leadership would best feature (Adair).

FIELD A - No leader is needed for this group to function.

In the event of a major crisis, the team leader in {C} may revert to {A}, the other end of the T. & S. continuum and 'tell' the team what to do in a more autocratic manner. This has the value of reducing uncertainty for the team as the team leader accepts responsibility him/herself.

DRAWING RIGHT CONCLUSIONS

- Make no assumptions that any management group OUGHT to be a team. Only groups working in FIELD {C} need be teams.
- People/groups may move between fields when working together.
- Being realistic, do you need concentrated courses on teambuilding?
- Who, in the company hierarchy, needs team-building skills?

- What percentage of a particular management group's time is spent in {C}?
- How often would they use team-building skills of developing trust, openness, sharing, etc.?

- Some senior management 'teams' may avoid working in the difficult field {C} by appointing consultants, working parties, etc. to solve leaving themselves the 'puzzle' of choosing between recommendations 'X' or 'Y'

SAVING TIME & EFFORT

For particular management groups, identify :-

- their role & function,
- their potential field of operation,
- their need for team-building skills of openness & trust,
- where can effort & expense best be expended?

See also :-
Another view 1
OUTLINES of views of D. Casey & W. Critchley - given to World Congress on Management Development - JUNE '84

THE BUSINESS OF WINNING

* AN APPROACH TO MANAGEMENT DEVELOPMENT
* HANDLING PEOPLE
* ROLE OF THE LEADER
* FEATURES OF LEADERSHIP
* OUTCOMES OF GOOD LEADERSHIP

MANAGEMENT DEV'T

You develop better managers by :-
- Analysing what works & makes things happen.
- Acknowledge what doesn't work & avoid using those techniques.
- Developing better leaders
- Establishing sound, clear structures & procedures

DEVELOP LEADERS

- Start early by putting them in charge of something / someone with responsibility for real life decisions.
- Put them on the shop floor for 18 weeks to get a 'worm's eye' view of problems (e.g. poor comm^{ns}) & some insight into jobs of others.

STRUCTURES & PROCEDURES

- Clear pyramidal hierarchy.
- Establish clearly who is in charge of what (& whom).
- Spell out task responsibilities.
- Establish good mgt. comm^{n}. system downwards.
- Establish teams, briefing from 1:4 to 1:15 maximum.

OUTCOMES

- The creation of 'worth' as well as wealth.
- The cooperation of the workforce.
- In Public Service Organ^{ns}:- 'achieve more with less'.
- A winning combination.

HANDLING PEOPLE

Most people work better if :-
- They have a clearly defined task
- Know who is in charge.
- They know their responsibilities.
- They are communicated with
- They have a set of rules which fair, well-defined & enforced.

- Consult them for their opinions. Listen & note.
- Tell them of your requirements & .... → Leader sets targets.

ROLE OF THE LEADER

- Accepts responsibility for a task.
- Accepts resp^{y}. for a group of people (subordinates) upto a max. 15 / team.
- Set targets for them
- Be responsible for achieving them.
- Communicate regularly with the group
- Delegate operating decisions to individuals if they are capable.
- Make people want to cooperate

- Keep it good.
- Keep it simple.
- Use common sense.

- Let them accept responsibility (for their results) to the team within which they function.

FEATURES OF LEADERSHIP

- Senior managers must 'love' & care for their subordinates. You don't have to like them!
- You gain cooperation by leadership — you cannot buy it.
- Support & implement decisions passed down (though you disagree)
- Distinguish between 'authoritarianism' & 'authoritative behaviour'
- Setting a good example yourself is not enough - get org^{n}. right too.
- 'Walk the job' & workplace. See & be seen. Show you care & understand.
- Recognise potential when you see it.
- Learn to live with failure. Pick up & start again.

- The company has a bigger ideal than yourself.
- A common purpose is necessary.
- 'Put on' enthusiasm & hope.

- Some show it in youth, others made show it in middle age. Develop it.

MANAGEMENT LEADERSHIP v.v. THE UNIONS

- If mgt. comm^{ns} ≠ union comm^{ns}, workers allegiance is to the union.
- If mgt. leadership ≠ union leadership, workers allegiance is to the union.
- The manager & shop steward have two complementary roles. There is no need for conflict.

∝ ISSUE 1

Outline of a talk given by John Garnett of The Industrial Society to the World Congress on Management Development - JUNE 1984

ASPECTS OF BOUNDARY MANAGEMENT (B.M.)

* NEED YOU BOTHER WITH B.M. ?
* HOW DO YOU BEGIN B.M. ?
* WHO SHOULD DO IT ?
* WHEN TO DO IT ?
* HOW TO PURSUE B.M.

NEED YOU BOTHER ?
- Is it a managerial demand ?
- How clear cut is the nature of your role & that of your unit / department / section ?
- Will it prevent the disruption of operations ?

To ensure the continued operation of your unit & to influence regulatory conditions pertaining to your unit's operations :
- within the company,
- within the company's environment.

To reduce organisational stress.

Politically, how dependent are you upon the influence of others :
- within the company,
- in the company environment.

Strategic considerations.
- Controlling inputs eg. ensuring supplies in the right form; in the right quantities; at the right time.
- Controlling outputs eg. maintaining customer loyalty; changing their expectations; in aspects of selling.

WHEN TO DO IT (B.M.)
- In anticipation of needs.
- As part of an on-going activity.
- When the climate is favourable .....
  - for them, or
  - for you.

HOW DO YOU BEGIN B.M. ?
Begin by analysing :-
- WHAT could influence you/your unit ?
- WHO might .. .. ?
- WHY may people .. .. ?

WHO SHOULD DO IT ?
- Your superiors
- You
- Your subordinates

- by virtue of their existing knowledge (political & strategic) & using their existing contacts & influence.
- to indulge in cross-boundary activities, have you :
  - the need or the time ?
  - the authority or the scope ?
- they may lack the authority &/or knowledge to do an effective job.

HOW TO PURSUE B.M.
- By planning
- By political means
- By building networks

PLANNING for strategic gains :- creating conditions for continued support & new developments.

POLITICALLY - considering Why we need to cultivate people and Who in particular.

BUILDING NETWORKS of useful contacts using :
- colleagues within the company &/or organisation.
- friends in other companies &/or organisations.
- 'political' personalities.
- pleasantries & favours (intra-company)
- gifts & hospitality (especially in a selling environment).

Leading towards a predictable, reciprocating system of relationships.

* ACTION PLAN decide to do...
  - Nothing, or
  - Analyse how long you spend per work week already, &
  - Build upto stating clear objectives & strategies to continue the activities.

  - What activities,
  - With whom, &
  - Why
  - For how long ?

BECOMING AN EXPERT (WITHIN AN ORGANISATION)

* WHAT SORT OF 'EXPERT' ?
* WHERE CAN YOU BECOME AN 'EXPERT' ?
* WHAT CONSTRAINTS TO EXPECT
* ADVANTAGES FOR THE ORGANISATION
* ADVANTAGES FOR THE INDIVIDUAL

WHAT SORT OF 'EXPERT' ?

One could develop expertise in :-
- A particular aspect of a technical job where knowledge is changing.
- One aspect of a staff or personnel function.

You could use knowledge acquired ...
- in another organisation,
- through specialized training,
- outside the job within one's personal domain.

WHERE ? This is determined by the organisation which employs you. It is easier :-

- In a large organisation
- In an 'organic' organisation
- If it need not depend upon the co-operation of others.

LARGE ORGANISATIONS

- Offer more scope to develop expertise.
- More use for a narrow specialism.

'ORGANIC' ORGANISATIONS

- Easier to organise it.
- Possibly fewer job 'demands' & greater freedom for 'choices'.

DEPENDING ON OTHERS

- Fewer demands upon social skills.
- Fewer constraints & obstacles.

ADVANTAGES FOR INDIVIDUALS

- A career strategy
- A non-financial motivator
- May lead to the creation of a new job / unit / company.

AS A MOTIVATOR

- Increased personal satisfaction & growth in the job.
- Furthers your career in this or your next job.
- Enhanced recognition & status.
- May lead to more choice if promoted.

A CAREER STRATEGY

- Create a niche for oneself which is unoccupied by others.

CONSTRAINTS TO ANTICIPATE

Mainly your boss's expectations :-
- "You cannot devote energy & to secondary pursuits"
- "Stick to what you're paid to do!"
- You have clearly defined job responsibilities & must concentrate on job 'demands' & not 'choices'.

ADVANTAGES FOR THE ORGANISATION

- Some morale advantages.
- Could lead to new developments, products, business, markets, etc.
- May supplement Research & Development activities.
- Need not cost the organisation anything

TOWARDS DEVELOPING MANAGERIAL EFFECTIVENESS

* WHAT IS 'EFFECTIVE MANAGERIAL BEHAVIOUR'?
* TOWARDS LEARNING TO BECOME EFFECTIVE
* SHORTCOMINGS OF CURRENT TRAINING COURSES

EFFECTIVE BEHAVIOUR

"Efficiency is concerned with doing things right. Effectiveness is doing the right things"
(P. DRUCKER, 1974)

EFFECTIVE MANAGERIAL BEHAVIOUR depends upon :-

- How the manager interprets his/her role & responsibilities
- How others interpret his/her role & responsibilities.
- The congruence of these views & subsequent actions

- Less focus on being busy & active.
- More focus on results, outputs & getting things done.
- Making the right choices inside the 'job space.'

LEARNING TO BECOME EFFECTIVE
(Assisted by the trainer)
Managers should :-

- Attempt a needs analysis, recognising the specifics of one's job
- Identify a learning process which is effective for him/herself.
- Identify learning activities where managers are required to be effective.

- Engage managers themselves in the analytical process.
- Idenfify their reality & engage in it.
- What do they need to do to become more effective in THIS job?

SHORTCOMINGS

- Planned & executed as is economical & convenient for trainers &/or companies.
- Differ little between orgn^s though orgn^s differ widely.
- Over-emphasise dev't for the future rather than issues of current requirements.
- Purvey generalised knowledge & skills, detached from reality.
- Deal with efficiency rather than effectiveness - misplaced emphasis on managerial skills.
- Leaves the manager to cope with the difficulty of transfer of knowledge from training course to day-to-day work.

* STEPS TO IMPROVE MANAGEMENT DEVELOPMENT

- Start with the reality of where the managers are now
- Focus on issues with which they are familiar.
- Analyse & improve relationships between their own function & others in the business.
- Encourage movement between jobs within the organ^.
- Emphasise the relevance of the learning activities on courses to real-time experience
- Use appropriate well-known & tried learning methods.
- Accept that different managers learn differently
- Trainers should DEVELOP individuals, not PROCESS them

- Eases 're-entry' problems after courses.
- Helps the transfer problem since 'no-transfer' is involved if dealing with real-time experience.
- Different learning styles adapt to different learning activities.
- Cathartic mix of learning activities on training courses is too 'hit-or-miss' to be valued.
- Reduce 'tutor-centred', increase 'learner-centred' types of activities.
- Cause managers to recognise & improve their own learning processes.

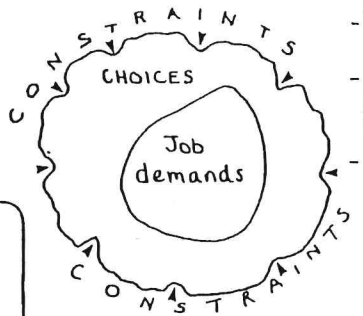
- Open their eyes to learning experiences in their jobs.
- Mgt. Educ^ should help people handle their own learning.
- Effective learning if comfortable, acceptable & usable.

∝ Issue 1

MANAGEMENT DEVELOPMENT & IMPLICATIONS FOR MANAGERIAL CHOICE 1

* A FRESH VIEW OF MANAGERIAL JOBS
* QUESTIONING YOUR JOB
* IMPLICATIONS FOR MANAGEMENT DEVELOPMENT

A FRESH VIEW A job could be modelled on the analogy of :-
- A flexible space, surrounded by constraints & enclosing ....
- Basic job demands, leaving
- An area of choice.



- Jobs are dynamic so lines are wavy/changing
- Managers have a choice within the job to do/not do some tasks.
- No two managers would make identical choices.

QUESTIONING YOUR JOB
- Do YOU have to do all the demands yourself ?
- How much of your job is concerned with choices ?
- Do you over-emphasise the constraints ?
- Do you not see some of the choices available to you?
- Does your mental picture of your job correlate with reality ?
- How does your boss see your job?
- Do you do the demands well ?
- Are you making the right choices?

CHOICES - you may emphasise some aspects of your job, possibly at the risk of neglecting others, when working with :-
- Peers ... consulting, planning, etc.
- Boss ... accepting responsibility.
- Subordinates ... Coaching, etc.
- System ... doing paperwork.
- Externally ... customer contacts, etc.
- Risk areas ... accepting or avoiding.
- New technology ... accepting change.

DEMANDS - may originate from :-
- Peers .... for assistance, etc.
- Boss .... for effective performance, info, etc
- Subordinates ... for guidance, training, etc.
- Self .... setting personal standards.
- System ... conform with bureaucratic req'ts, etc
- Externally ... from customers, suppliers, etc.

CONSTRAINTS - factors of the internal & external environment which influence the job-holder eg.
- financial constraints,
- company policies,
- economic conditions,
- government legislation,
- technological advances,
- demographic considerations,
- union activities, etc.

- What can you delegate ?
- What should you delegate ?
- Is everything that you do work which must be done ?

- This is the empty space outside the job demands but within the constraints.

An **EFFECTIVE** manager :-
- does the demands well,
- makes the right choices.

- Management developers/trainers should begin to identify training needs by helping managers :-
- Examine their jobs in the light of the model outlined above
- Examine their performance
- Identify areas where assistance of some sort would be accepted & valued.
- Identify the sources of assistance.
- Relate learning experiences to their individual learning styles.

- What parts of the model do you occupy?
- What other parts should you occupy?
(It may be difficult to extend choices without involving managers in major changes.)

- How well do you perform on the current demands ?

Based on an address given by Rosemary Stewart to the World Congress on Mgt. Dev't. JUNE 1984

∝ ISSUE 1

MANAGEMENT DEVELOPMENT & IMPLICATIONS FOR MANAGERIAL CHOICE 2

* STARTING THE MANAGEMENT DEVELOPMENT PROCESS
* LOOKING OUTSIDE YOUR JOB
* TASKS FOR THE MANAGEMENT TRAINER-DEVELOPER

STARTING THE M.D. PROCESS

- Managers should keep a diary of their daily activities.
- Which parts of their 'space' do the managers occupy?
- What choices HAVE they made?
- What choices COULD they make?

LOOKING OUTSIDE YOUR JOB

- Try to understand the nature of other jobs in the organ?
- What kinds of experiences are offered in those other jobs?

Is there space they don't recognise?

ANALYSE

- How is time spent?
- Which tasks were DEMANDS.
- Which were CHOICES.
- What are you NOT doing that you want to do?

(Managers may be helped to better self-management techniques)

TASKS FOR THE MANAGEMENT TRAINER

- Assist managers to review their jobs (individually) & the choices they are making.
- Discuss what experiences would assist them to think more strategically.
- Where, in his/her job 'cycle', is each individual manager?
- Route careers to give a variety of job experiences
- Identify, within the organisation, who are the good coaches

How can you use them to improve the perspective of other managers?

Managers learn more from their jobs than from courses.

Moves between staff & line jobs offer valuable developmental experiences.

Stages in a new job 'cycle'

0 - 6 months, Managers bring a perspective & enthusiasm to the job & do well those things they can do.

6 - 18 months, Manager immerses him/herself in the job; finds out more about the job. The manager's & the job perspectives differ. A quiet reflective period - good for learning activities to be inserted.

18+ months - bursts of activity.

Based on an address given by Rosemary Stewart to the World Congress on Mgt. Dev't. June 1984

CHOOSING A LEARNING METHOD FOR MANAGEMENT DEVELOPMENT

* LOOKING AT TEACHING/LEARNING METHODS
* TEACHING/LEARNING MANAGERIAL SKILLS
* CHOOSING A METHOD
* TRAINERS' OPTIONS & RELEVANT SKILLS
* CONCLUSIONS

LOOKING AT METHODS
- Each method is the sum of many distinct steps or elements.
- Many different methods have common elements.
- Trainer's role is to combine/synthesise elements to produce effective learning.
- Identify what elements go into the methods & which you need.

MANAGERIAL SKILLS
- Basically, a manager needs skills in handling people, problem solving & implementing solutions. (on top of certain technical skills)
- Such skills require innovative & creative training approaches.
- To find such methods - see notes below.

CHOOSING A METHOD - may be based upon :-
- Planned learning objectives
- Group size
- Trainer's personal philosophy
- Desired degree of student/trainee autonomy

- Current trend is to devolve responsibility for learning onto trainee managers themselves.
- It assumes that a need for self-dev't. has been recognised & accepted.
- Method chosen would depend upon whether trainee wanted ....
  - self pacing learning activities,
  - choice (to work or not),
  - choice of method,
  - choice of content (to match own goals & interests).

GAGE & BERLINER suggest :
- 1 to 2, individual methods eg. prog'd lng.,
- 3 to 16, small groups e.g. role plays; etc.,
- 17 to 24, large group e.g. syndicates; etc.,
- 25+, aggregate e.g. lecture, etc.,

- Based on trainer's assumption of how people learn.
- Linked with knowledge of learner's learning style, &
- What resources are available for learning & where learning is to take place.

Writing learning objectives is first step only :-
- Bloom's Taxonomy listed, (1956)
1. Cognitive Domain - knowledge & its manipulation.
2. Psychomotor - movement.
3. Affective Domain - feelings, emotions, values.
- Pedler's Classification added :- (1978)
4. Interpersonal &
5. Self Knowledge - personal growth.

A typical manager's training objectives would be a mix of these. None would be separable from the others. Some would be dominant, the chosen method would reflect the main objectives to be achieved.

TRAINERS' OPTIONS for in-company trg. :-
- Do-it-yourself or buy-in expertise,
- Buy package & consultant,
- Buy package & D-i-Y,
- Send managers away on courses.

TRAINER'S SKILLS
- Choice of method demands knowledge of methods.
- How well do you know the trainees?
- Have you the relevant expertise?

- Their needs, through needs analysis?
- Their learning styles (see notes.)
- Can you match method to learning style to satisfy needs?

- The mix that is 'trainer/trainee/needs/situation/circumstances' is always unique & varying.
- There is no 'best method'.
- There is no table which tells the trainer ... 'to achieve this .. do that'
- The role of the trainer is unlikely to superceded by improved tech[nology] alone.

NOTES :- FOR LIST OF METHODS SEE "ENCYC. OF MGT. DEVT. METHODS" HUCZYNSKI, A. ISBN 0-566-02334-2 1983 GOWER PRESS
Also : Outlines "INVESTIGATING LEARNING STYLES, 1 & 2."

α | ISSUE 1

A STRATEGY FOR MANAGEMENT DEVELOPMENT

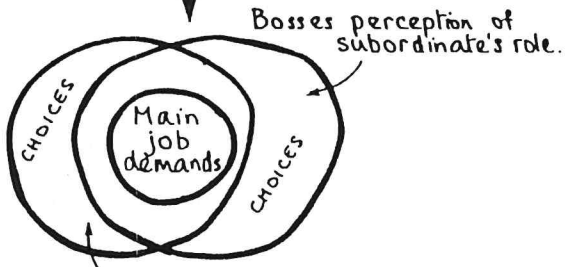
* ✳ STUDY THE FEATURES OF EXCELLENCE IN COMPANIES
* ✳ STUDY THE FEATURES OF EXCELLENCE IN MANAGERS
* ✳ IDENTIFY THE TRAINER'S ROLE

Excellent companies have several features in common. It does little harm to emulate these features in your organ^n:

- a caring philosophy for staff, customers & service, etc.
- few are found with a tight matrix organisational structure.
- foster innovators & entrepreneurs within the organ^n, seeing the workforce as a source of ideas too.
- keep lines of communication short for more rapid decision-making.
- push autonomy down the hierarchy.
- have clearly defined objectives for forward plans.
- look at past successes, learn from them & repeat them (if feasible).
- stay close to the business they know best.
- seek excellence in quality, service, reliability & value.
- learn from the people they serve - e.g. good product ideas

Successful managers may have several of these traits. They :-

- reflect & learn from the past.
- have respect for individuals, no "us : them" attitude.
- have a caring philosophy - know their staff & their jobs.
- delegate & push autonomy down, even to 'shop floor' level.
- shield their subordinates from stress.
- are flexible & welcome change, may become change-agents themselves.
- know their own roles clearly.
- make subordinate's roles clear too
- probably leads a small team with clear objectives, regularly maintained.
- foster good communications ⅊.
- model & promote acceptable behaviour.
- accept the intellectual aspects of coaching & may coach subordinates.
- adapt their own leadership style as circumstances require.



(Ideally, the two fields would be congruent)

Trainer's role in management development within the company.

- Perform a company-wide needs analysis with training priority for high 'needs' areas.
- Reduce anxiety over coaching & encourage boss/subordinate coaching activities.
- To help managers improve their performance & that of their unit / section / department.
- Identify manager's individual learning styles & provide suitable learning experiences in accordance with those styles.
- S.W.O.T. analysis on managers & their team members

Possibly identify their leadership style.
- if its working, don't change it.
- if it isn't working, turn them on to more effective styles (W. REDDIN)

- Suggests areas for development activities.
- What blockage prevents them from reali ing their potential or ambitions.
- Generates interest in the need for training

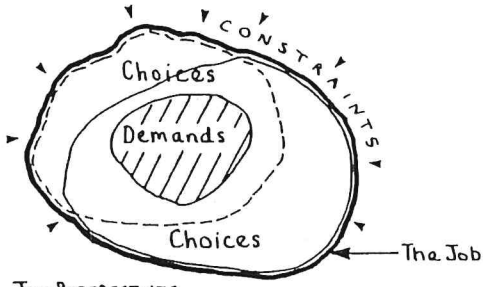
DEMANDS CHOICES & CONSTRAINTS

* DEFINITIONS
* WHY CONSIDER THEM ?
* THE COMPANY'S PERSPECTIVE

DEFINITIONS

- Demands - 'what anyone holding the job HAS to do.'
- Choices - 'activities the jobholder can, but does not have to, do.'
- Constraints - 'factors internal or external to the organisation that limit what the jobholder may do.'

Perceptions of these may differ enormously where Job Descriptions are loose & responsibilities wide.



JOB PERSPECTIVES

Manager A (——) v. Manager B (- - -)

- Manager A may be 'people oriented' focussing downwards to subordinates.
- Manager B may focus outwards to customers & boundary transactions.
- Manager C would be different again.

WHY CONSIDER THEM ?

- They help managers take a more objective look at their jobs.
- To question manager's beliefs on how/what they should do.
- As a career strategy towards thinking of what job suits you best.
- They can help you assess your effectiveness.
- To find out what you need to do to get more enjoyment from this job.

JOB DEMANDS

- Performance demands - meeting minimum acceptable performance levels.
- Behavioural demands - activities concommitant with the job holder.

- Some managers perceive as 'demands' what others perceive as 'choices'.
- Managers commonly exaggerate 'constraints' & therefore restrict their consideration of 'choices'.
- To reduce 'tunnel vision'.

Many constraints upon choices are revealed to be self-imposed.

THE COMPANY'S PERSPECTIVE Using this model, the examination will help the company :-

- to analyse jobs & see how effectively it is using its managers
- match managers to jobs for increased effectiveness & enjoyment for job-holders.
- improve selection procedures to choose competent job-holders
- improve job design with clearly defined demands & areas where choice is permitted.
- make a positive contribution to appraisal interviewing

→ Helps to build an accurate Job Description (Work content) & Job Specification (Skills of Job holder)

→ Matching boss's & subordinate's perceptions of the job, demands, choices & constraints.

Based on an address given by Rosemary Stewart to the World Congress on Mgt. Dev't. June 1984

ISSUE 1

2.18

DEVELOPMENT TRAINING FOR MANAGERS -
(USING THE OUTDOORS)

* WHAT IS DEVELOPMENT TRAINING ?
* WHAT DOES IT SEEK TO ACHIEVE ?
* WHO CAN DO IT ?
* THE ROLE OF THE TRAINER (STAFF)

DEVELOPMENT TRAINING is
A strategy which seeks to develop the effectiveness of an individual's and/or group's performance in the work setting.
- It involves experiential learning
- It incorporates periodic process reviews
- It uses the outdoors for pursuits which may be potentially dangerous.

ADVANTAGES
- Overcomes the complaints that conventional courses lack reality & relevance.
- Managers apply their skills to real situations with prospect of immediate feedback on their performance.
- People are totally involved. Rely on own resources - leading to personal & team development.
- Learner-centred orientation of activities

ACHIEVEMENTS ?
It is a very potent learning experience which seeks to develop participants.....
- As managers
- As team or group members
- As individuals

PROCESS REVIEWS
These activities are real situations & experiences. Staff & participants review them to identify 'PROCESSES' involved; followed by feedback to (and between) participants.
REVIEW PROCEDURES involve:
- Self assessment,
- Peer feedback,
- Linking within theoretical framework,
- Relating problems of outdoor activities with parallel work situations.

AS INDIVIDUALS
- Heightens self-awareness & gives insights into one's strengths & weaknesses.

AS GROUP MEMBERS
- Develops leadership & team-building qualities.

AS MANAGERS
- Within the group it :-
- increases one's confidence,
- develops co-operation,
- participants manage...
  - communications,
  - problem solving,
  - decision making,

etc.

EXPERIENTIAL LEARNING
- Common pattern follows Kolb's learning cycle :

INDOOR & OUTDOOR EXERCISES → for generation of learning data
→ PROCESS REVIEW — Identifying emerging issues
→ THEORY — Clarification of experience, insight.
→ PLANNING — Preparing for action on course or at work

ROLE OF THE TRAINER (STAFF)
Much depends upon the skill & sensitivity of those who organise the course. They must :-
- BE FLEXIBLE, they may need to modify & refine the course components in the light of experience
- BE SKILLED OBSERVERS, setting tasks then standing back to allow participants to generate ideas & solve problems. Later - to give feedback.
- ORGANISE & PLAN, to sustain the momentum of the course & avoid unnecessary hiddups.
- HAVE RELEVANT ACADEMIC KNOWLEDGE, to identify leadership & other issues of group dynamics & relate them to experiences, during the reviews. Also assist transfer from course experiences to work situations.

High staff : participant ratio, around 1 : 5

WHO CAN DO IT ?
- Participants are usually middle managers & supervisors of mixed ages, experience & backgrounds.
- Male or female in mixed groups.
- The fit & healthy, (at outset !).

FOR HOW LONG ?
- Commonly about 5 days at a residential centre with possibly 3 component outdoor activities.

∝ ISSUE I

INVESTIGATING LEARNING STYLE (1)
(FOR MORE EFFECTIVE LEARNING)

* WHAT'S THE PROBLEM ?
* WHAT MUST A MANAGER LEARN ?
* ATTITUDES & OPPORTUNITIES
* RECOGNISED LEARNING STYLES

THE PROBLEM

Two persons may undergo identical learning experiences after careful preparation. One benefits but the other doesn't. WHY was learning effective / ineffective respectively ?

LEARNING NEEDS

- A careful needs analysis will establish appropriate needs having studied individual performance criteria.
- Skills for effective performance :
  - depend on organisational demands
  - vary with the type of job

→ - Usually very specific.
- Usually changing / dynamic.

MANAGERS MUST BE COMMITTED TO TRYING TO MEET THESE NEEDS

WITHIN THE WORK ENVIRONMENT

- Opportunities to learn come through :
  - being coached, (on the job)
  - modelling by experienced colleagues

→ - Tutoring is usually off-the-job & not by colleagues.
- Too often the learning provision is incompatible with the manager's individual learning style.

- Attitudes of others at work & the 'climate' do have an effect on people

Climate, may be unhelpful or hostile.
Rewards, may / may not foster learning.
Expectations, of self & boss may conflict (or diverge).
Boss &/or colleagues may not want to coach or model.

RECOGNISED LEARNING STYLES ★

P. Honey & A. Mumford identified four styles with associated strengths & weaknesses.

- Activist
- Reflector
- Theorist
- Pragmatist

Every individual will show some features of each classification but usually one style will dominate.

ACTIVISTS

Strengths :
- Open to change,
- Flexible, open-minded,
- Thrive on challenge.

Weaknesses :
- Often take risks unnecessarily,
- Quickly bore & seek new activities,
- Tendency to personal over involvement.

PRAGMATISTS

Strengths :
- Practical & realistic,
- Businesslike,
- Technique oriented.

Weaknesses :
- Task oriented,
- Intolerant of waffle,
- Less interested in theory or principle than in practice.

THEORISTS

Strengths :
- Logical thinkers,
- Rational & objective,
- Disciplined.

Weaknesses :
- Low tolerance of disorder,
- Intolerance of intuition & subjectivity.
- Tendency to perfectionism.

REFLECTORS

Strengths :
- Thoughtful,
- Methodical,
- Good at listening.

Weaknesses :
- Reluctant participators,
- Overly cautious,
- Un-assertive.

★ For greater depth & detail see 'THE MANUAL OF LEARNING STYLES' Honey, P. & Mumford, A. 1982 ISBN 0 9508444 0 3

a Issue

INVESTIGATING LEARNING STYLE (2)
(FOR MORE EFFECTIVE LEARNING)

* FIRST STAGES IN EFFECTIVE SELF DEVELOPMENT
* WHO COULD BENEFIT FROM THE EXERCISE OF YOU COMPLETING A L.S.Q. ?

EFFECTIVE SELF-DEVELOPMENT requires
- A personal commitment to development.
- A 'needs analysis' to identify personal wants, organisational requirements & any skill deficiencies that can be remedied by some form of 'education'.
- Complete a Learning Styles Questionnaire (L.S.Q.) to identify your dominant learning style(s) & plot a learning style profile

WHO MIGHT BENEFIT ?

The L.S.Q. information & profile might benefit ....
- Yourself
- Your boss
- A trainer

PLOTTING L.S. PROFILES
- Most individuals exhibit a mix of the 4 styles (Activist, Reflector, Theorist, Pragmatist) but 1 or 2 may dominate.
- A 'perceived' profile plotted (concerning you) by a colleague is a useful comparison.
- Helps an individual to seek learning opportunities best suited to one's dominant style.

ALTERNATIVELY
- You may endeavour to become equally proficient in all styles, an all-rounder. A better decision but takes longer & has more associated difficulties.

YOU BENEFIT
- By consciously avoiding inappropriate learning experiences.
- In planning self-development, knowing how you best function.
- Shared with your boss - the psychological reward of knowing of his/her interest in your development.

YOUR BOSS
- When planning to assist the development of subordinates - to know what learning activities to sponsor.
- Now understands better how you work.

A TRAINER (TUTOR)
- Before courses
  - Identifying potential learning difficulties for individual participants.
  - To assist course planning having done a training needs analysis.
  - In planning development activities for trainees &/or colleagues.
- During courses
  - Matching course activities to individual participants.
  - By introducing participants to the learning styles concept - they may know better how to gain from their activities.

L.S.Q.'s are supplied free with copies of 'THE MANUAL OF LEARNING STYLES' by P. Honey & A. Mumford
ISBN 0 950844 0 3

LOOKING AT DISTANCE LEARNING SYSTEMS

1. A COMPANY PERSPECTIVE

* HAVE YOU DONE A NEEDS ANALYSIS ?

NEEDS ANALYSIS Have you :-

- Identified the target population of trainees, potential users ?
- Identified the trainee's needs (subject content) ?
- Do all trainees have the same needs ?
- What alternatives are available to distance learning ?
- What barriers does D/L overcome that other systems do not?
- How will you evaluate the effectiveness of D/L training ?
- What are the performance criteria for success ?
- What are the consequences of not adopting D/L ?

* WHY D/L ?

* WHY NOT D/L?

WHY DISTANCE LEARNING ?

- Need to be located within easy access of college or trg. centre disappears.
- Study at trainee's own pace.
- Study at a time which suits the individual.
- Courses start/end when trainee decides.
- People with low mobility (for whatever reason) may enter the scheme.

WHY NOT D/L ?

- Not a wide range of subjects available in D/L mode.
- Is the material flexible enough to stand alone & yet satisfy all possible student demands?
- 'Loneliness of the Long Distance Learner' lacking the spur of of a tutor or competition.
- Limited learning technologies available at home or remote sites
- There will be many mis-matches between materials & trainee's learning styles. D/L wont suit many trainees.

Not everyone has equal access to computers; film projectors (or video recorders); tape-slide facilities; workshops; libraries; etc.

* CONSIDER THE COST FACTORS

COST FACTORS

If suitable materials exist already :-

- Setting up & admin. costs not too prohibitive

If suitable materials don't exist :-

- Development costs (from scratch) too prohibitive for many org^ns to consider.

- Large trainee target population brings economies in the long term.
- What is the cost of counselling/ tutoring staff activities which will be needed ?

Not considered here are :
- printing & storage,
- packaging & mailing,
- telephone charges,
- admin. staff costs, etc.

* COMPANY CONSTRAINTS

- Logistical
  - number of trainees ; number of sites ; degree of dispersion.
  - training people to administer scheme; record keeping; progress chasing, up-dating materials; etc
  - necessary learning technologies on-site or at home?
- Behavioural
  - how to motivate trainees ? What rewards for the successful ?
  - the consequences of not achieving ? Motivating & training tutoring & counselling personnel.
- Personnel
  - Who will be in charge (central location & remote sites) ?
  - more staff will be needed in the training functions to assist with coaching, training, counselling, firefighting.
- Budget
  - who'se budget ? who monitors expenditure?

LOOKING AT DISTANCE LEARNING SYSTEMS

2. THE PRODUCTION PERSPECTIVE

* FIRST STEPS

FIRST STEPS :-

- What do you wish to achieve?
  - define a target population
  - set your objectives
  - have you established a need?
- How will it be funded?
- What timetable are you working to?
- Following the preparation of materials, then what?
- How will you evaluate the success of the project?
- Who will be in charge & what authority will they have?
- Do the materials exist elsewhere in some form or other?

- Target population needs to be large to merit the potential expenditure & make it worthwhile.
- How many hours of study?
- What medium/media will be used for instruction & learning?
- How wide a spread of subject matter & activities?
- At what level is it aimed?
- Realistic time budgets should be established. Writing & developing is a slow operation.
- A pilot scheme for small scale evaluation & testing?
- Partial implementation into existing company training activities?
- Company wide implementation?
- Market them?
  - Whose copyright?
- What are the staffing implications?
- Don't re-invent wheels.?
- Is there something which can be adapted for your purposes? Start some desk research.
- What are the copyright implications of adapting materials?

* BUDGET IMPLICATIONS

BUDGET IMPLICATIONS

- This cannot be seen as a marginal expense. The costs are heavy & front-loaded.
- THE major costs are on people
- What capital purchases are necessary during development & for operation of the scheme

- Development may have to run parallel with on-going training activities, with a substantial time lag before coming on stream.
- A favourable ratio of 1 hour study : 12 hours preparation is unusual.
- A more realistic figure is nearer 1 : 20 hrs (or worse!)
- Have you staff who can do the origination?
  - YES? can they be spared from other duties & at what cost?
  - No? can someone be trained to suitable levels of competence? How long will it take?
- What new skills might be required?

Graphics, Secretarial, Research, Tutoring,
Editorial, Administrative, Recording, Counselling,
Production, Distribution, Library, Consulting, etc.

- Equipment for production.
- Study facilities eg. computers, projectors, television, cassette players, etc
- Cost of converting space to fresh usage.

TOWARDS EXPERIENTIAL LEARNING

* THE MODERN SCENARIO
* STRATEGIC MANAGEMENT DEVELOPMENT (M.D.) FOR THE FUTURE
* ROLE OF THE MANAGEMENT TRAINER IN STRATEGIC M.D.
* EXPERIENTIAL EDUCATION

THE MODERN SCENARIO :-

- Increasing uncertainty & change.
- Advancing knowledge frontiers & technology.
- Complex organisational structures & management systems ineffective in dealing with complexity.
- Management executives need to acquire knowledge & judgement.
- Human perspectives are changing concerning quality of life & the function of work.
- Learning agenda keeps changing throughout a manager's career.
- Integrative skills cannot be taught by conventional trg. methods.

→ Use experiential learning methods, discussion & reflection. Helps to develop ability to deal with complexity.

BEWARE :- "Experience is a severe teacher, it tests first & gives the lesson afterwards."

EXPERIENTIAL EDUCATION :-

- Uses games, exercises & simulations in trg. programmes where learners observe the consequences of their actions.
- Makes use of development trg. (outdoors) to develop u'-standing of concepts of motivation, decision making & group dynamics.
- Provides a framework of integrative educ.'n, shared experiences & dialogue between participants.

- Sharing observations, feelings & thoughts in deciding what was learned.

STRATEGIC M.D FOR FUTURE

- Provide managers with access to knowledge & relationships network.
- Develop life-long learners to cope with continually changing career agenda.
- Use exp'l learning cycle for mgr.'s to better understand their relationships with people.
- See competence as a function of the fit between job dimensions & personal skills.

- If personal skills are > job demands, manager is dissatisfied.
- If personal skills < job demands, manager is challenged and stimulated.

ROLE OF MGT. TRAINER

- To manage the learning process integrating learning with work
- Help managers learn from their own experiences in life
- Avoid the label of 'dispensers of knowledge & wisdom'
- Identify 'job role : skills' mismatches.
- Use conflict, disagreement & differences between people to provide fresh perspectives.
- Understand learning in adults
- Help mgr.'s grow & make transition from technical to mgt. responsibilities

- When assuming higher jobs in org'ns, job demands expand dramatically. Identify trg. & educational needs
- Help mgr's learn <u>how to experience</u> events & use that experience.
- Adults learn better in situations where they are acknowledged as equals & experts - senior managers are experts.
- Learning should be integrated with real-time work to develop a general management perspective e.g. Action Learning &/or Rotation of Job function
- Adults have a need to teach as well as learn. Encourage coaching to promote on-the-job learning

From short-time, single-location, high certainty info. to long-term, wider views in conditions of high uncertainty & change.

From an address by D. Kolb to the World Congress on Mgt. Educ'n, JUNE 1984

∝ ISSUE 1

BEHAVIOUR MODELLING FOR SUPERVISORY TRAINING

* WHY DEVELOP SUPERVISORS ?
* THE SUPERVISOR'S PROBLEM AREAS
* THE SUPERVISOR'S SKILLS

WHY DEVELOP SUPERVISORS ?
- They are closest to where a company's resources are consumed.
- They set the climate in the organisation
  - Through their interactions with workforce
  - Through their occasional customer contacts.
- Their attitudes are models for the workforce to follow
- Insensitive or unskilled supervisors may cost the company dear in terms of lost production & poor I.R.

PROBLEM AREAS
- Dealing with things - controlling, recording, checking factors relating to production.
- Dealing with people

SKILLS
- 10% technical :- when promoted from within, we assume product & production knowledge to be adequate.
- 90% non-technical :- work & accomplishment is now through communicating with people

Attitudes
- to their peers (showing co-op^ & professionalism.)
- to their employer (following company policy).
- to the workforce (by modelling good work habits).

CONCERNING :-
- Poor work habits.
- Absenteeism & lateness.
- Health & safety aspects.
- Performance deficiencies.
- Employee relations, complaints & grievances.

SKILLS NEEDED :-
- Leadership; planning; listening; interpersonal; communications; using; judgement; etc.

* BEHAVIOUR MODELLING -BASED TRAINING
  - Trains 1 skill per 3-4 hour module.
  - Breaks each skill into a set of critical steps with behavioural objective for each.
  - Critical steps become an agenda for the supervisor to follow in initiating comm^ with an employee without causing alienation.

* BEHAVIOUR MODELLING DEVELOPS SUPERVISORS
  - By modelling skills to assist them with day-to-day problems.
  - By developing their own capabilities & increasing confidence.
  - Uses POSITIVE modelling - showing visually what must be done & how it should be done.
    - Uses films or videotapes of incident handling.
  - Gives opportunity to practise those skills under direction of a competent instructor.
    - Individual role-plays.
  - Gives immediate feedback on behaviour & actions from a trained observer (& possibly peers)
    - Maintaining the supervisor's self-esteem. Coach where necessary.
  - Also teaches how to receive feedback in non-defensive manner.
  - Contains an element of management reinforcement to ensure bosses coach & reinforce use of new skills.

*** WHY NOT TRADITIONAL SUPERVISORY TRAINING COURSES ?**
- Try to change attitudes before behaviour - with mixed success.
- Often not wholly relevant to day-to-day supervisory problems.
- Often a watered-down course meant for more senior managers.
- Puts theory & concepts before practical considerations.
- Lacks opportunity to practise & perfect techniques.
- Leaves supervisor to make the transfer from theory to reality.
- Sometimes builds resentment & scepticism.

MARKET SHARE & SEGMENTATION

* IMPROVING MARKET SHARE
* MARKET RESEARCH & CUSTOMER PREFERENCES

IMPROVING YOUR MARKET SHARE

- One way is to identify the BENEFITS the customer seeks to acquire & link them with the FEATURES of your product.
- Use benefit analysis

'Our product has 'X' which means that you get 'Y' when you buy it.' Feature this in the advertising.

BENEFIT ANALYSIS

- List full range of benefits for buyer & don't let familiarity with own product lead you to undersell it.
- Include benefits of the customer/company relationship.
- Differentiate benefits (ours versus competitor's products)

MARKET SHARE (DEFINITION)

To determine one's MARKET SHARE, it is necessary to identify the products which satisfy a particular set of customer wants & then work out your share of the aggregate of all brands in the survey.

MARKET RESEARCH INTO CUSTOMER PREFERENCES

- The producer needs to know about his customers:
  - what they purchase,
  - why they purchase it,
  - who are the opinion leaders.

These researches divide the consumers into recognisable market segments

e.g. TV advertising by celebrities.

WHY BOTHER? It helps to :-

- Differentiate your company from the competition. Rationalise & specialise.
- Concentrate on the market segment you prefer (Will influence packaging, etc.)

This in turn decides :-

- the marketing direction,
- what realistic marketing/sales objectives to set,

& • improves decision making by making managers think ahead.

IMPLICATIONS

- Customers show distinct buying/preference characteristics depending upon :-
  - their personal characteristics.
  - their response to particular products

e.g. brand loyalties

e.g. demographic features, & (where they live) socio/economic characteristics.

WHY DO THEY PURCHASE PARTICULAR PRODUCTS?

- Many answers may seem obvious
  - they buy food to eat,
  - they buy petrol to fuel the car.
- Where several similar products exist their behaviour seems quite arbitrary because .....

PEOPLE DON'T BUY PRODUCTS, THEY SEEK TO ACQUIRE BENEFITS.

- The market researcher must identify the benefits to the advantage of the producer.

FACTORS IN EVALUATING SALES PROMOTIONS (S.P.'s)

* PROBLEMS OF EVALUATION
* WHY IS EVALUATION DIFFICULT ?
* COMMON RANGE OF S.P.'s

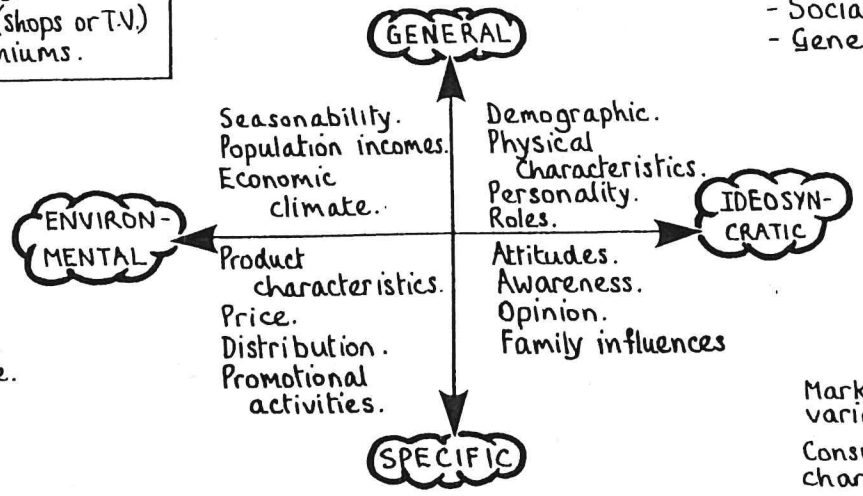
PROBLEMS OF EVALUATION
- What do we mean by evaluation ?
- What criteria can be used ?
- How do we undertake the evaluation?
- How to establish performance criteria ?
- What are the criteria for success ? (Refer back to S.P. objectives)
- Circumstances determine techniques & may include :
  - timing, - funds available.

WHY IS EVAL^{N} DIFFICULT ?
- Numerous behavioural & psychological variables influence the consumer
- Market place variables e.g. different types of outlet; size & location variables; etc.
- Differing types of S.P. range from retailer's bonuses to sporting or cultural sponsorship.
- A variety of methods of eval^{n} are possible in the different circumstances.

COMMON S.P.'s (for customers)
- Price reduction in 'sales'.
- Price off / extra contents packs.
- Competitions.
- Bingo / games of chance.
- Linked (cooperative) promotions of 2 brands (products).
- Sampling (give aways), effective but expensive.
- Give away items with £x of other sales.
- Coupons (in newspapers) drive customers in to use them.
- Buy 1 - get 1 free (or variations) if pack top sent to manufact^{r}.
- Buy multipacks - same as discounts.
- Price off next purchase.
- In-store sales persons.
- Celebrity promotions (shops or T.V.)
- Self-liquidating premiums.

Promotions attempt to help consumer reach mental consonance or equilibrium. Consumers react best to information which reinforces already-held notions about brands & products. Avoids mental dissonance.

CONSIDER CONSUMERS' DECISION ENVIRONMENT
- In-store influences → - known brands, - familiar shop, - advertisements seen, etc.
- Point-of-Sale factors → - price, - availability, - communications, etc.
- Other promotional activities (competitors).
- Social setting. → - home & family circumstances, - opinion of friends, etc.
- General influences



Influences of motivational principles on buyer behaviour vary from :
- 'general' to 'specific',
- 'environmental' to 'ideosyncratic'

◄(See A.R.Wolfe's schematic model, 1970)

Marketing promotions affect 'SPECIFIC' variables mostly.

Consumer motivation & segmentation characteristics lie in 'IDEOSYNCRATIC' end.

∝ Issue 1

PLANNING A PROMOTION

* WHY A PROMOTION ?
* BUDGETING A PROMOTION
* KNOW YOUR MARKET & THE PRODUCT
* CO-ORDINATION & DESIGN
* TALK TO RETAIL GROUPS
* HOW WILL YOU EVALUATE SUCCESS ?

WHY ? WHO IS IT AIMED AT ?
- for consumer motivation ?
- for trade motivation ?

WHAT WILL IT YIELD ?
- launch of a new product,
- boost 'off peak' sales,
- aggressively - to eliminate minor competitors,
- defensively - because competitors are doing it,
- to gain greater merchandise displays.

DECIDE OBJECTIVES
- Is there a valid reason to mount a promotion ?
- What is the best promotional medium to employ ?

MARKET & PRODUCT
- Decide what you are selling, benefits, peace of mind, etc.
- Who are your customers ?
  - young/old ; - families/couples;
  - male/female; socioeconomic gp.?
  - single/married; etc.
- What are your product characteristics?

WHAT WILL IT COST ?
- Type of promotion governed by size of budget.
- Who will do the promotion ?
- Divide the objectives into many sub-objectives
  - prioritise & cost each sub-objective, makes budgeting easier.

- Self-liquidating premiums very popular because easily tailored to a budget.
- all in-company.
- involving a consultant.*
- tailormade by a specialist promotion company

CO-ORD^N & DESIGN
- Call a coord^n meeting of all who will be involved.....
  - to design the promotion,
  - to draw up action plans,
  - to time & network activities & decisions
  - to plan initial presentation to major retail groups.

Network activities like :
- artwork for package, advertising, leaflets, displays, etc.
- copy to printers,
- legal clearance,
- talk to retailers,
- sales conference & launch
- accummulate factory & field stocks, etc.

TALK TO GROUPS
- A necessary move to gain retailers support & obtain their comments on 1st roughs of - packaging ideas, - advertising ideas, - display ideas, etc.

Get feedback on commitment in light of other current promotions.

SPECIALIST COMPANIES

Offer dispassionate & skilled opinion and experience. They will design a promotion to fit special or individual needs, e.g.

NATIONAL PROMOTION - massive impact on the consumer.

REGIONAL PROMOTION - less impact, does less for brand image but cheaper.

* The trade needs creative consultants for new ideas.

SALES PROMOTION (S.P.)

* DEFINITION OF SALES PROMOTION
* WHEN NOT TO USE PROMOTIONS
* DEVISING A PROMOTIONAL PLAN

A SALES PROMOTION may be defined as:-
- Any in-store promotional activity,
- Any trade incentive for the retailer,
- Any scheme to motivate a company's salespersons,
- Sponsorship,
- All display materials, point-of-sale aids & demonstrations,

..... undertaken with the ultimate intention of persuading (motivating) customers to trial or purchase a product; to deepen brand loyalty; or defend the product from compet[itors].

Unlike marketing activities,
- S.P.'s mostly rely upon producing an emotive response in the (potential) customer.
- S.P.'s are commonly deployed against the consumer but may be aimed at the various levels of distribution within a company's own salesforce.
- S.P.'s must take account of the activities of competitors.

DEVISING A PLAN

Assume the product is already well packaged, competitively priced & properly advertised.
- Analyse the problem, &
- Clarify your objectives → Write down what the S.P. is to achieve - clearly, & concisely using appropriate language & in measurable terms.
- Identify the budget available & consider the constraints → What type of S.P.?
- Define the support back-up necessary.
- Devise an incentive programme for sales force, Wholesaler, retailer → - Cash incentives. incentives? - Special awards? - Merchandise incentives during the campaign?
- Run a small scale test in an area or town.
- Measure how successfully the objectives have been met.
- Plan timetable & coord[inate] activities → e.g. - pack design & printing, - point-of-sales displays, - presentation to sales force, wholesaler, retailers, etc. - is the season correct? - how frequently should S.P.'s occur?
- Execute & evaluate S.P. activities in terms of cost effectiveness in reaching objectives.

WHEN NOT?

Depends upon the degree of sophistication of the of the market, (Grocery market very sophisticated) but not....
- when the product is performing poorly unless the reason has been adequately analysed & the basic faults corrected.
- when the problem is a logistical problem of distribution or stock levels.

OBJECTIVES, are they:
- Tactical objectives → are they offensive, defensive or maintaining your present market position? Do you want trial, repeat or multiple purchases?
- Strategic objectives → Not expected to yield noticeable effects immediately but over a period of time producing a favourable mktg. climate.

* PROBLEMS WITH S.P.'s
  - Greater sophistication of retailer & consumer means manufacturers have to adapt their promotion activities.
  - Conflict of objectives & interests between manufacturer & retailer. → - Manufacturer's objs. - increase market share; Retailer's objs. - increase local share in competition with other retailers.
  - Lack of manuf[acturer]/retailer communication. → - Failure to appreciate other's point of view.

* WHAT MAKES GOOD S.P.'s
  - The high customer appeal of the branded product.
  - The offer represents real value for money.
  - Good support in the pre-, during & post-promotional stages.

« Issue 1

SALES PROMOTION TECHNIQUES
- SELF-LIQUIDATING PREMIUMS (S.L.P.)

* OBJECTIVES OF S.L.P.'s
* WHO PAYS FOR THE PREMIUM ?
* CHOOSING THE PREMIUM
* PROBLEMS IN HANDLING PREMIUM MERCHANDISE

DEFINITIONS :-
- PREMIUM - a piece of merchandise which is given away by the retailer OR offered at a low cash price on proof of purchase of the item being promoted.
- SELF LIQUIDATING - full cost recovery

S.L.P. OBJECTIVES
- To attract customer attention.
- To encourage purchase of product being promoted.
- Increase in sales induced by opportunity to obtain the premium free or discounted
- To create excitement in relation to the brand & reinforce brand loyalty..
- A means to an end to attract new customers.

It is sometimes possible to turn the S.L.P. into a deliberate revenue earner if uptake > forecast.

WHO PAYS ?
Ultimately the customer pays, but for what ?
- To recoup the cost of the premium OR
- above + administration + distribution OR
- all above + all promotional costs too

So whole promotion must be consumer oriented no matter what else is involved

CHOOSING THE PREMIUM
- Must have its own appeal to be usable in selling the main promotion.
- It must be a good match for the product being promoted, quality-wise.
- How much will the RETAILER pay for it / charge for it ?
- It must be clearly identified as value for money to the consumer.
- Ideally the premium merchandise has its own well-known brand name.

AVOID
- Associating a good product with shoddy premium merchandise.
- Gimmicks & short-lived novelties.
- Fragile articles, (risks dissatisfact^{n} &/or losses through breakages).
- Bulky articles - giving handling & storage problems.
- Variety within premiums (diffent sizes & colours).
- Merchandise e.g. electrical goods which may fail in service & need after-sales repair & servicing.

IDEALLY - pre-test the promotion to identify potential, unforseen snags.... using :
- full test market, OR
- personal interviews OR
- mailed questionnaire

HANDLING PROBLEMS & RELATED PROBLEMS
- Storage problems in retail outlets.
- Handling difficulties for the marketer.
- Selection & testing to ensure premium merchandise conforms to normal retail specifications.
- Need for special display materials & space.
- Losses through breakage, pilfering & non-return
- Maintaining continuity of supply. Are repeat orders possible ? Any imported items may be subject to delays.
- Normal after-sale guarantees must apply (for which the promoting company don't wish to be liable).
- Responsibilities to be clearly identified in the contract.

What to do with unwanted premium merchandise after the promotion ?

THE ROLE OF COLOUR IN SELLING

* WHY IS COLOUR IMPORTANT ?
* WHEN IS COLOUR UNIMPORTANT ?
* SOME PROBLEMS WITH COLOUR

COLOUR CAN SELL

- Appeals to the emotions as well as to the eye → Quite independantly of a person's education.
- Appeals to the subconscious → -Can assist the reassurance process of a purchaser - their judgement was correct!
- Colour is 'fashionable' → -Over the years colour trends emerge. 'Old' colours may mean dead/dated stock in hand.
- People want change → -Desire for change is inherent in human nature.
- Promotes brand awareness → -Attracts attention to a symbol, logo or brand name. -'Attractive' colours stop the customer to examine the product. (½ way to a sale) -Hard colours attract attention.
- Can produce a positive environment or selling medium → Coupled with a product but not a part of it eg. - red background for meat, - green background for vegetables, - black background for glassware, etc.

Witness impulse buying in items as costly as cars.

COLOUR IS UNIMPORTANT when:

- Product is purchased for its performance than for its aesthetic appearance.
- Certain industrial products are coloured for safety, signalling, ease of visibility or at whim of architect → - Commercial vehicles often sold in simple priming paint. - Coloured fire extinguishers or gas cylinders signal their contents. - Machinery coloured to reduce glare which may reduce visual acuity & cause physical & emotional stress and reduce efficiency.

PROBLEM WITH COLOUR

- Needs to be harmonised with other colours → 'Hard' colours in front of 'soft' colours. NOT vice-versa.
- Appears different in different lights eg daylight, fluorescent light.
- Same hues appear different on different surface textures.
- People's perceptions vary → Colour is seen by the eye but perceived by the brain. eg. 'SIZE' is a function of colour brightness.
- People's preferences vary → - Young persons - go for bold, bright colours. - Mature persons - are more interested in form & design than in colour.
- Colour has associations → - White - hygienic. Pink - sweet things. - Warm colours - reds & brown. Cold colours - greens & blues. Solemn colours - black & grey.
- Colours may be temperature sensitive → In strong sunlight: - white objects stay cooler. - black objects absorb energy & heat up.

TAKE CARE when linking colours with foods.

∝ ISSUE 1

ADVERTISING 1 - SETTING OBJECTIVES

* WHAT ARE THE OBJECTIVES OF ADVERTISING ?
* SETTING OBJECTIVES FOR ADVERTISING
* LIKELY PROBLEMS
* IMPLEMENTATION

OBJECTIVES OF ADVERTISING

- To create 'branding' or build an image.
- To create awareness,
- To affect attitudes
- To educate & inform,
- To motivate enquiries,

..... in the mind of the consumer.

SETTING OBJECTIVES

- Objective writing focusses attention on the product or service.
- They must be capable of being achieved so you must measure them to know they were achieved
- Write them in clear, precise, appropriate terms
- Precise objectives assists the allocation of funds.
- Advertising objectives may be distinguished from marketing objectives. Must be compatible with corporate objectives.
- They also serve to keep senior management aware of advertising plans & activities.

- Does a favourable attitude in the consumer always lead to the desired buying behaviour? (A difficult objective to measure)

OBJECTIVES MAY VARY :-

- With time, depending where product is in its 'life cycle' e.g.
  INTRO → Image building & awareness.
  GROWTH → Branding & educating.
  MATURITY → Image building & informing.
  DECLINE → Informing
- Major events in the market may prompt a change in objectives. e.g. actions of competitors ; introduction of new technology or products.

PROBLEMS :-

- Many factors may influence sales performance.
- It is sometimes difficult to relate actual sales (in isolation) to a specific advt.g campaign.
- Can objectives be accurately evaluated & in what currency ?

FUNDING

- What should be spent on advert.g ?
- Are we spending on current activities or investing in the future ?
- Is your market intelligence accurate & up-to-date ?
- Advertising expenditure should be perceived as 'risk reduction'.

- Is your objective setting based on adequate or accurate researching of the market.

- Dividing them into sub-objectives assists media scheduling & planning.

IMPLEMENTATION

Requires the :-

- Co-ordinated & consistent representation of the company &/or product to target audience.
- Coordination necessary also between production/distribution/promotion & advertising with their responsibilities clearly defined.

- This requires planning & the whole thing requires time.
- Devise LONG- & SHORT-TERM OBJECTIVES.

ISSUE 1 ∝

ADVERTISING 2 - PRINCIPLES of ADVERTISING

* HOW DOES ADVERTISING WORK ?
* YES, BUT HOW DOES ADVERTISING WORK ?

ADVERTISING WORKS .....
- In different ways in different circumstances,
- But cannot be generalised.
- Every theory may be refuted, &
- There is no 'best method'.

(..... rather unhelpful)

ADVERTISING WORKS through :-
- PERSUASION - motivating people to buy
- PERCEPTION - precedes understanding & awareness
- CREDIBILITY
- PERSONALITY
- COGNITIVE DISSONANCE - (I believe one thing, but do another)
- FEAR APPEALS - arousal due to perceived threats or anxiety.
- THE MEDIUM
- BUYER'S ATTITUDE towards the product or service.

PERSUASION
- its effects diminish with time,
- persuasion attempts to change attitudes,
- people can be changed by repeated exposure to persuasion.

PERCEPTION
- a necessary component in advertising.
- individuals are very selective (believing what they want to believe).
- is coloured by recent experiences &/or socio-economic circumstances.
- must not be dismissed by advertiser.
- Consumer perceptions often differ from the producer's perception of what the consumer wants (or is thinking)

INVOLVEMENT WITH THE MEDIA
- involvement with the medium may enhance the effectiveness of the advertising, e.g.
  - TV is passive - little viewer participation.
  - Newspapers are more effective involving an activity (reading) & interaction with the advertisement.

CREDIBILITY
- what is your 'track record' ?
- are your claims for the product credible ?
- when using celebrities to promote the product are they credible in relation to the product field ?

FEAR APPEALS
- may suggest jeopardising one's security, esteem or affection by 'not owning X'
- if fear levels are too high, they trigger defence mechanisms & the receiver (consumer) 'switches off'.
- not altogether a good ploy due to potential, undesirable effects.

COGNITIVE DISSONANCE
- is supposed to link attitude, behaviour & action to keep a balance.
- used to explain & predict post-decision behaviour.
- aroused by exposure to discrepant information.

PERSONALITY
- consumer behaviour links with the personality of the potential buyer.
- personality often links with the market segment to which the buyer belongs.

∝ ISSUE 1

WRITING ADVERTISING COPY (1)

* THE SHAPE OF ADVERTISING COPY
* HEADLINE OBJECTIVES
* HOW TO WRITE HEADLINES

THE SHAPE OF COPY :-
- Headline
- Body of text
- Summary & invitation to action
- Layout considerations.

(See Outline III)
(See Outline II)

HEADLINES
- Select your audience.
- Capture attention from competing headlines
- Arouse interest in product
- Excite curiosity about the product
- Persuade reader to continue to text

- What reward for reading?

CURIOSITY
Interrogative headlines :-
- Put Q's into reader's mind.
- Invite them to read on to find answers.

- Emphasise successes then hope for bandwaggon effect.

- 'FLAG' the advertisement

HEADLINE OBJECTIVES
- Attract attention → Extoll the benefits & be specific about the why, what, where, how, etc.
- Command → Command them to 'stop & read this.'
- Negative approach → Tells reader how to AVOID :
  - risk & worry,
  - losses & mistakes,
  - loss of prestige,
  - social deprivation, etc.
- Positive approach → Infer prospect of GAIN :
  - gain, in money, prestige, etc.
  - saving, of time & money, etc.
  - accomplish something,
  - social betterment.

HOW TO WRITE HEADLINES
- Start from where the reader is → - What are his/her circumstances?
- Aim at reader's focal point → - Most persons' main focus is ..... I ; my family ; my home ; my job ...
  - Most parents are ....firstly ; individuals
  ....secondly ; parents

1 2 3 4 ... n

Use of 'You' in headlines.
- Reflects attention to their focal point.
- Adds relevance to message.
- Makes it a personal appeal.

- Infer satisfaction of common desires → - More gains,
  - Avoid losses.
- Use KEY words

Key words
- 'NEW' meaning 'better'.
- 'FREE', any give-aways ? Use headline to stress them.
- stress 'GUARANTEES'. → • They must be credible.
  • Mention them in headline &/or text.
- advertise 'RESULTS' to be obtained.

WRITING ADVERTISING COPY (II)

* COPYWRITING STRATEGIES
* PRODUCING COPY
* HOW LONG ?

STRATEGIES Consider :-
- Appeal to reader's instincts & emotions
- What do you want to say?
- Show advantages of the product
- Stress the BUYING points
- Sell ADVANTAGES - not things.
- Invite ACTION. (see OUTLINE III)

Stimulate their emotions then substantiate with FACTS.

Know people & what makes them tick. People want to :-
- Gain things - more money; bigger jobs; less worry; for themselves &/or family - comforts; personal betterment; etc.
- Be better people in society; be more popular; acclaimed; looked up to; receive recognition & prestige; etc.
- Do pleasant things.
- Save time; money; discomfort; worry; risks; etc.

THESE WILL VARY WITH AGE & A PERSON'S ACCOMPLISHMENTS

BUYING points interest & concern the reader, whereas SELLING points are mainly what the vendor considers important.

It must be what the reader wants to hear or the copy remains un-read.

HOW LONG ?
- How long can you sustain interest ? The longer the interest, the more you convince, the more you sell.
- Un-readable copy - remains unread.
- Readable copy - seems shorter.

PRODUCING COPY
- Know your product features
- That first paragraph
- Proving facts
- Choice of language
- Approaches

SHOW ADVANTAGES or 'What's in it for me ?'
- better health,
- more comfort,
- more money,
- more leisure,
- greater popularity,
- advancement (socially / at work)
- pride of accomplishment,
- security, etc.

PRODUCT FEATURES
- The more facts you tell, the more you sell. (Upto the reader's limit).
- 'FACTS' are 'REASONS' to buy, to support decisions, a basis for rationalisation.

APPROACHES May be :-
- Inductive ; prove your product claim, - assert the advantages. (builds belief, appeals to emotions)
- Deductive - assert the advantages, - prove your claim.

- Follow up the appeal of the headline.
- Start the 'reward for reading' promise.
- First & last paragraphs are usually best remembered.

CHOICE OF LANGUAGE
- Quick, easy to read sentences
- Present tense; active verbs.
- Pictorial nouns; singular.

PROVE FACTS
- Maintain credibility to be convincing.
- Quote evidence • laboratory tests of design. • installation & service facts.
- Quote performance tests • achievements in use (by whom & why) • commendations & expert evidence. (who says what about the product ?)

WRITING ADVERTISING COPY (III)

* THE INVITATION TO ACTION
* LAYOUT CONSIDERATIONS

INVITE ACTION Convert reader attention to reader action.
- Here are the advantages ... grasp them
- If you want action, ask for it
- Do something, but say 'why'

N.B. Delayed action reduces the potential for sales.

Provide a positive stimulus to action.

Actions like :
- Go to your dealer (but say 'why')
- Send for FREE booklet.
- Ask for trial (get a packet, test drive, etc.)
- Clip coupon & mail it or take it to .....

LAYING OUT THE COPY
- Aim for eye-appeal
- Lay out is second to the copy in importance
- Catch & hold attention
- Avoid the 'neutral' look
- Look for CONTRAST, STRENGTH & SIMPLICITY
- Using pictures

Remove obstacles to a quick purchase. If they need to 'think about it' then they will probably not make a purchase.

- Fashions change but it is the COPY that sells.
- White space is useful when used in moderation but it does not sell like the words it replaces.

SEEKING ATTENTION maybe using :
- the 'ir-REGULAR' or 'dis-HARMONY,'
- the 'unusual',
- the 'powerful' to eclipse competition,
- devices to convey 'movement' & 'action'.

NEUTRAL - looking like every other advertisement.

DO SOMETHING because :
- of limited stocks,
- offer expires on .....,
- prices going up,
- prices coming down,
- you can claim a discount,
- of our guarantee of...
  - money back,
  - sure results, etc.

..... spurs action.

USING PICTURES
- Words & pictures are better than words alone.
- Pictures hold attention

eg.- showing ADVANTAGES of possessing 'X'
- showing DISADVANTAGES of NOT possessing 'X'

Pictures have a relevant selling function. It is easier to recognise something than recall part of the text.

LONG TEXTS & SELLING LETTERS
- Keep paragraphs short & indented.
- Use sub-headings to break up the body of the text.
- Add colour where/if possible.
- Use white space tastefully.

∝ ISSUE 1

BASICS OF NEGOTIATING

* Definitions
* When to negotiate ?
* Common dilemmas
* Movement & concessions.
* Dealing in Packages
* Avoiding deadlock
* People problems

DEFINITIONS

- NEGOTIATION :- a transaction involving the voluntary consent of two parties to reach a most favourable outcome, free of potential veto.
- CONCEDE :- to grant, yield, surrender.

WHEN TO NEGOTIATE

- When buying goods.
- When selling goods.
- When making contracts.
- When settling disagreements

COMMON DILEMMAS

- How much to ask for ?
- What will they accept ?
- How far to move ?
- How long to hang on ?
- How to avoid deadlock ?
- What are their expectations ?

STARTING PROCEEDINGS

- Avoid o.n.o. (or near offer)
  - it weakens your opening.
  - shows eagerness to settle.
  - shows amateur approach.
  - produces asymmetry in buyer : seller balance.
- Avoid time constraints → concentrates negotiations. Sometimes unfavourably.
- Ask questions "What ifs...."
- Suggest terms of contract. → Deal in packages.

MOVEMENT & CONCESSIONS

- Movement - the parties move toward a compromise solution.
- Concessions - 'give-aways' to produce movement. Opening goodwill concessions display weakness & harden tough negotiators

EXPECTATIONS

- Are subjective, based on your opening gambit.
- When selling/asking - start very high. →
  - Assure seller you want it but lack resources to match opening. Be credible. →
  - Structure their expectations.
  - Undermine their confidence.
  - Reduce their expectations.
  - Audacity is essential - (but not always enough).
  - Best opening is the toughest credible one.
- When buying/offering - start very low.

PEOPLE PROBLEMS

- They have hopes, prejudices & grievances.
- Offensive &/or provocative behaviour.

- All of which may themselves lead to deadlock and hinder settlements

DEALING IN PACKAGES

- Preface negotiation with 'If...'
  "If you ..... I will ....."
  (the price) (the package)
- Don't alter prices, make new packages to facilitate movement.
- Give & take ? NO!
- Equal moves ? NO!
- Fair transactions ≠ equal transactions

AVOIDING DEADLOCK

- Don't attack opponents - it only strengthens their defence
- Don't take a rigid stance - it is a form of attack.
- Avoid emotive rhetoric - gets you sidetracked or cornered. & sours communications. → Wastes energy, escalates dissatisfaction via side issues.
- Keep talking & open up new fields. →
- Search for new packages.

Keep talking/maintaining dialogue

- Talk of "How to....."
- Avoid "Why you must...."
- Use open question format.
- Suggest remedies / alternatives / trade-offs.

THE 'GET-OUT'

- Disclose lack of authority to continue.

JEWISH PHILOSOPHY (?)

- Fire at a tree & you may hit the ground. Fire at the sky & you may hit a tree!

ASPECTS OF NEGOTIATING

* Sources of POWER in negotiation
* Objectives of negotiating
* Types of negotiator
* Skills & tactics
* Use of threats in negotiations

WHAT IS POWER? – partly psychological.
- POWER is perceived by your opponent.
- POWER is subjective.
- Subjective perceptions are usually stronger than objective circumstances.
- Beware of self-induced intimidation.
- Suspect illusions of grandeur.

– You have POWER if your opponent thinks you have power.
– Thinking your opponent is powerful weakens you.

– POWER is often given away by self-induced intimidation.
– The opposition is seldom as formidable as it appears.
– Influencing & intimidation often work against an opponent. They go 'soft'.

– Outward trimmings intended to impress & intimidate you.

OBJECTIVES OF NEGOTIATION
- Alter your opponents' perception of YOUR power, credibility & strength.
- Alter your opponents' perception of THEIR power, credibility & strength.
- Facilitate 'movement' in your favour.
- Reach a 'most-favoured outcome' – following established rules & rituals.

(See S.300d)

SKILLS & TACTICS
- Uncover opponents' boundaries.
- Conceal your boundaries.
- Acting as agents for absent principals.
- Erect boundaries which are difficult to circumvent.
- Use skilled agents to protect inexperienced principals.

"my members have instructed me..."

TYPES OF NEGOTIATOR
- 'Tough'
- 'Soft'

– faced with a 'tough' negotiator many opponents go 'soft'.

– Seek anomalies in opponents' case to reduce their credibility.
– Test opponents' authority to negotiate.
– Look for trade-offs (IFs....)

'SOFT' NEGOTIATORS
- Open modestly.
- Move considerably.
- Make frequent concessions.
- Are scared of deadlock & time constraints.
- End up giving more than they wanted to.
- Succumb to threats or suggestions of sanctions.

'TOUGH' NEGOTIATORS
- Open with high demands.
- Have high expectations.
- Stick at (or near) their demands.
- Move infrequently.
- Make few concessions.
- Concessions are small, never large.
- Not scared of deadlock & time constraints.
- Take more than they give.
- Do not succumb to threats and sanctions.

(Usually does not believe they can be implemented.)

USE OF THREATS
- Use of threats & counter threats accelerates potential deadlock.
- Compliance threats compel action → 'do it, or else...'
- Deterrence threats deter action. → 'if you do, I'll.....'
- Sometimes implies you are more more powerful than you are.
- Used against you, look for a lesser evil to accept.
- Often produces negative or hostile response thereby souring negotiations.

– Beware the opponent who:
  – tests your credibility,
  – challenges you to implement them. Can you? At what cost?

EDUCATING TO COUNTER STRESS

* Differentiate between PRESSURE & STRESS
* The nature of stress
* Identifying the symptoms of stress
* Keeping things in perspective

PRESSURE & STRESS
- Good salaries & status of managers reflect the demands upon them.
- If satisfaction is high for work rendered, pressure is recognised & accepted.
- If satisfaction low, - stress develops

Managers could/should be educated in the many aspects of stress during in-company courses or during initial training.

NATURE OF STRESS
- Stress can occur :
  - in individuals,
  - in & between groups,
  - in a company,
  - in a nation.

- Good stress (eustress) may be be satisfying to an individual.
- Bad stress (distress) may be destructive to an individual.

KEEPING IN PERSPECTIVE
- Recognise stress as just another work problem.
- Individual life planning sessions incorporating biographical study & life phases illustrates ones' changing ability to cope.
- Encourage managers to articulate the problems of stress

- Reduces the feeling that to admit to being stressed implies inability to cope.
- Reduces the fear of the 'unknown'.

IDENTIFYING STRESS Learn to recognise the symptoms ...
- in yourselves,
- in others.

Look for individuals or groups likely to suffer stress

- Stress has multiple causes & many inter-related factors.
- Identify them in your own work work & life style as in others's.
- They are quite common in personal & home circumstances.
- Is it possible to seek 'WHY' & then pre-empt it?

* How you can begin to influence stress
  - Identify the job factors which
    - increase stress,
    - reduce stress.
  - Consider how they may be controlled or varied

On in-company courses - best done in syndicate groups,
- preceeded by an introductory talk,
- followed by a plenary session.

* Helping yourself & others
* Educating spouses

HELPING YOURSELF & OTHERS
- Individual life-planning sessions.
- Start training in coping skills
- Mutual aid co-counselling pairs.
- Consider dietary factors which influence good health.

- Practice positive relaxation techniques.
- Desensitisation techniques. (Role play examines stressful situations & aids understanding).
- Draw upon real life
  - Draw in persons who have had heart attacks &/or stress-related illness.
  - How did they cope &/or recover?
  - Draw upon spouses. How did they cope before & after the events?

- Emphasise value of out-of-work activities to reduce tension & increase relaxation.
- Recognise spouses as equal partners in a manager's life.
- Help them identify symptons & educate them to begin to alleviate them

Tell them what help they may need & where to find help.

HOW THE COMPANY CAN ALLEVIATE STRESS

* ACKNOWLEDGE STRESS
* EDUCATE ITS MANAGERS → See Outline :- 'Educating to counter stress.'
* KNOW THE 'COST' OF STRESS
* EXAMINE CURRENT PRACTICES & PROCEDURES
* REVISE & AMEND POLICIES

(The elimination of stress is neither possible nor desirable.)

ACKNOWLEDGE STRESS may arise within the company. There are common identifiable circumstances where stress is generated due to :-

- organisational structure
- work circumstances
- insensitive management of change,
- lack of feedback on performance,
- poorly handled personnel &/or administrative procedures

- Dealing with cumbersome bureaucracies generates stress in entrepreneurial managers.

REVISE POLICIES

- Many companies have policies for dealing with stress-related problems eg. absenteeism, alcoholism.
- Few have policies intended to prevent or counter stress.
- Try to actively promote good physical & mental health

Can the company pay to :
- Encourage exercise & good diet,
- Provide facilities for exercise & better (sensible) catering,
- Provide educational & medical services to counter stress,
- Institute regular medical checks for key staff initially, extending where possible to other staff.

KNOW THE COST OF STRESS in financial terms & human :-

- Lost time due to illness or absenteeism through stress.
- Loss of production because of missing trained staff.
- Cost of replacing lost staff

- Advertising,
- Interviewing,
- Training, etc. & cost of
- Early retirement pensions, inducements to leave, etc.

Work circumstances

- High noise levels,
- Unsafe conditions, hazards or dangerous work,
- Too fast work rates,
- Risk of accidents,
- Too close supervision,
- Ill designed jobs or job reorganisation.

ORGANISATION PROBLEMS

- Lack of job satisfaction.
- Lack of promotion opportunities.
- Excessive pressures.
- Job insecurity or threat of redundancy.
- Too great expectations.

EXAMINE CURRENT PROCEDURES &

- Change work styles.
- Improve your mgt. of change.
- Scrutinise personnel & admin^ve policies & procedures. → Make them 'user-friendly'.
- Observe Health & Safety req'ts.
- Seek to improve job satisfaction → Increase individual's control over his/her work situation.
- Re-organise & reduce work groups → Promote cohesion & social interaction.
- Improve screening & recruitment processes.
- Increase worker participation. → Identify / exclude potential TYPE 'A' persons

TYPE 'A' MANAGERS - high risk of coronary heart disease. Characterised by overt behaviour patterns including extremes of:
- competitiveness, - aggression,
- restlessness, - striving for achievement,
- impatience & haste,

& often high occupational status. TYPE 'B' - Low risk

COPING WITH STRESS AT WORK

* UNDERSTANDING YOURSELF
* UNDERSTANDING OTHERS
* MODIFY YOUR BEHAVIOUR
* CONTROL SITUATIONS (YOUR ENVIRONMENT)
* ATTITUDES
* POSITIVE COPING STRATEGIES

UNDERSTANDING YOURSELF
- What brings on depression?
- What is your capacity to absorb stress?
- Work out your objectives in life / work / etc.

→ Biography & life planning sessions can be both absorbing & therapeutic.

UNDERSTANDING OTHERS
- Identify cues to stress build-up in others.
- Observe difficulties in inter-personal relationships likely to produce stress.

MODIFY YOUR BEHAVIOUR

Increase flexibility by :-
- becoming less emotionally involved,
- coping with unpopularity (being disliked,)
- train in relaxation techniques,
- avoiding stressful situations,
- reduce your involvement in stressful situations.

CONTROL SITUATIONS
- Pace difficult situations.
- Pre-empt potential crises

→ -Through improved self-management skills.

ATTITUDES
- Be prepared to help yourself.
- Beleive you can affect stressful situations.
- Be confident in handling them

→ To do this you must understand the nature of stress. Discuss it freely; remove fears from your mind; examine the consequences; understand the implications for you & your family.

COPING STRATEGIES
- Talk to someone, let off steam.
- Exercise (for relaxation/distraction)
- Control your diet.
- Go out somewhere – get away.
- Practice relaxation techniques to reduce tension.
- Build supportive relationships

→ e.g. co-counselling

PSYCHOPHYSIOLOGICAL RESPONSES
- increased heart rate, - tension,
- increased blood pressure,
- headaches, - sleeplessness,
- pallor or flushing.

COGNITIVE RESPONSES (THOUGHTS)
- exaggerated importance of trivial events,
- arbitrary inferences,
- overgeneralisation of events,
- mild paranoia,
- anticipating anxiety.

BEHAVIOURAL RESPONSES
- occupational performance affected.

STRESS & WOMEN (♀) MANAGERS

* POTENTIAL SOURCES OF STRESS
* HOW DOES STRESS AFFECT YOU ?
* WORK-RELATED CAUSES OF STRESS

POTENTIAL SOURCES
- Organisational, work-related.
- Extra-organisational

STAGES
- Alarm reaction, defence mechanisms alerted.
- Resistance develops. Adapt &/or return to equilibrium.
- Exhaustion – adaptive mechanisms collapse.

- Home related activities
- Being family 'manager' with all that that entails & in a variety of possible circumstances.
- Marital problems.
- Anxiety over self &/or family concerns.
- Conflicts ..... spouse / partner, career / home, career / child bearing.

STRESS AFFECTS YOU
- Harmful stress (distress) may affect:
  - behaviour,
  - performance,
  - mental & physical health.
- Useful stress (eustress) may stimulate these upto a certain level.

WORK RELATED CAUSES
- Intrinsic to any job, any sex
- Role within the organisation
- Coping with prejudice
- Overt & covert discrimination
- Sexual harassment
- Special pressures of sex stereotyping

INTRINSIC STRESS CREATORS
- Work overload or underload.
- Quantitative – too much work.
- Qualitative – too hard work.
- Dis-satisfaction with work.
- Unsatisfactory / inadequate training to do your present job.
- Lack of feedback on performance.

etc.

ROLE
- Few role models to copy leads to role ambiguity.
- Lacking (♀) peer support gives feelings of isolation & problems of 'visibility'.
- Being the 'token' woman ..... & the test case for employing more female managers.

PRESSURES
- To adopt so-called '♂ attributes' & skills of being .....
  - assertive,
  - confident,
  - decisive,
  - delegatory.
- To avoid power, aggression, success .... & so behave in a socially approved manner. To be seen so is deviant & unfeminine.

PREJUDICE
- Perceived inadequacy to fulfil exclusively ♂ executive role.
- Imposed roles. To reject them is to be labelled 'feminist'.

DISCRIMINATION
- From climate.
- From employer.
- From fellow staff, especially ♂ managers who feel threatened.
- In career prospects → characterised by – under promotion.
  - blocked career development.
  - often lower pay.
  - lacking mobility due to family commitments.
- From org'nal structure → Consequently tries too hard, too obviously. Leads to inability to delegate. (To delegate – implying 'can't cope')

SEXUAL HARASSMENT
Affects – morale,
– efficiency,
– self confidence.

PRACTICES TO REDUCE STRESS

* REDUCING TENSION
* BREAK THE WORRY CYCLE
* SEEK SUPPORT
* RECONSIDER WORKING PRACTICES
* COPING WITH ANGER

REDUCING TENSION

Tension is physical - not nervous. This contributor to stress may be reduced by physical means:-

- Release tension by physical work, activity or exercise.
- Don't work continuously, take breaks & change activities → Relax; chat; break routine; run up stairs; etc.
- At home use relaxation techniques, meditation or yoga.
- Take meal breaks with congenial companions.

RE-APPRAISAL When worrying, don't just appraise the situation causing the problem & worry cycle.

- Appraise the situation - yes. Then...
- Construct coping strategies.
- Appraise efficiency of each.
- Appraise resources available.
- Appraise strategies with respect to your ego; other wants; your other roles.

Objective systematic thinking reduces anxiety.

SUPPORT

- Ventilate fears & feelings to someone who will listen without judging you.
- Be prepared to give up being angry or worried.

WORKING PRACTICES

- Delegate where possible.
- Think ahead & set priorities → Accept that some small things cannot be done.
- Perfection costs time, money & stress → Can you afford it?
- Pace yourself - don't sacrifice order & quality for speed.
- Commit yourself fully to one task at a time. Don't worry as well (- about other problems)
- Don't attempt more than you can comfortably accomplish. → Uncertainty is a major cause of stress. Reduce uncertainty by controlling your time, appointments, tasks & anything else within your sphere of activities.

Other people don't cause your emotions - you do. Other people provide the stimulus to which you react. You don't have to become angry. Being angry increases stress.

ANGER IS AVOIDABLE - often caused by:-

- Misunderstandings.
- Competitive struggles.
- Frustrated efforts to control others.

So

Can you achieve your objectives by other means? Re-appraise your motives, besides loss of dignity - is it worthwhile?

If emotional displays are inappropriate;

- suppress anger temporarily,
- smile at opponent / situation,
- vent anger harmlessly when alone by laughing, gesticulating, pulling faces, crazy antics, swearing, etc.

Rage, scream, pummel a cushion, throw or break something but beware of the emotional reactions you may initiate in others.

It is much better & less stressful to avoid potentially angry reactions in/against others by seeking alternative ways of achieving objectives.

RECRUITMENT INTERVIEW PROCEDURES

* PRELUDE TO QUESTIONING
* MANNER OF QUESTIONING
* TAKING UP REFERENCES
* MAKING NOTES
* GENERAL OBSERVATIONS

PRELUDE TO QUESTIONING

What will be your strategy for questioning interviewees?

- FRASER's 5-point Grading Scheme
- ROGER's 7-point plan
- Some other approach ?

5-point scheme explores :
- Impact on others by manner, appearance, speech, etc.
- Qualifications & attainments.
- Innate abilities of comprehension & aptitude for learning.
- Motivation. What moves the candidate, their determination & achievements.
- Adjustments - to get on with others, withstand stress & remain emotionally stable.

7-point scheme explores :
- Physical make-up (as above-1).
- Attainments (as above-2).
- General intelligence or basic intellectual ability.
- Special aptitudes - literacy, numeracy, manual, mechanical, etc.
- Interests - intellectual, physical, social...
- Disposition - maturity, self-reliance, ...
- Circumstances - domestic or other relevant circumstances.

MANNER OF QUESTIONING

- Be interested & patient with the interviewees.
- Avoid interrogation in favour of a steered, friendly discussion.
- Start with closed questions.
- Move to open questions.
- Avoid multiple questions; giving advice; argument; losing control or revealing standards

- Candidate just confirms his standards are your standards.
- Of self.
- Of interview... (to the candidate!)

TAKING UP REFERENCES

- Should be done before the interview to compare referee's opinions with the candidate's.
- Ideally by telephone
- Written references

WRITTEN REFERENCES
- What employer writes a bad reference ?
- What candidate furnishes a poor reference?
- Are they worth taking up?

TELEPHONE REFERENCES
- Faster.
- More frank than in writing (from character referees).

α ISSUE 1

GENERAL OBSERVATIONS ON UNTRAINED INTERVIEWERS

- The untrained manager is basically a poor interviewer.
- Often the interviewer's 'gut-feeling' gets too much prominence.
- Poor interviewing is expensive in wasted time; unwanted expense employing misfits & in effort expended getting rid of unwanted employees.
- They don't prepare the Job Specification* with sufficient care.
- Frequently accept the interviewee's word only concerning qualifications; job histories; hobbies & skills; responsibilities & job titles; employment gaps etc.
- They try to predict performance from perceived facts concerning the candidate.
- They make 'objective' selection decisions following 'subjective' filtering of interviewee information.

MAKING NOTES Ideally in a standardised format during the interview to enable the interviewer to :-
- Weigh the facts.
- Assess the candidate.
- Compare assessments.

Problems with casual note-taking

'CASUAL' NOTES
- Generally too lenient.
- Distorted by 'halo' effect of first impressions.
- Subject headings too vague to distinguish between candidates.

* JOB SPECIFICATION describes the requirements of the person to fill the post, eg physical & mental attributes; qualifications; experience; etc.

DEALING WITH POOR PERFORMERS (p.p.)

* CONSIDER THE JOB ITSELF
* PERFORMANCE DISCREPANCY & THE ORGANISATION
* DOES THE p.p. KNOW THE JOB ?

THE JOB ITSELF
- Is it too demanding / not demanding enough?
- Is it too noisy; badly designed; lacking correct tools; etc. ?
- Are others coping with similar jobs?
- Is any feedback on performance being given ?

PERF^CE DISCREPANCY & THE ORGANISATION
- Is it worth bothering about ?
- Is the company rewarding poor performance ?
- Does the company support new training initiatives ?

DOES THE POOR PERFORMER .....
- Know what to do ?
- Know how to do the job?
- Know where/how the job fits within the organisation ?
- Are there other possible reasons for the poor performance ?

-Has there been adequate job briefing ?
-Has the p.p. the basic abilities to do the job?
-Was induction & training adequate?

OTHER POSSIBLE REASONS
- Peer group rejection.
- Hygiene &/or motivation factors wrong → What does the p.p. think ?
- Mismatch of abilities for the job → Over recruited, too well qualified ?
- Family / cultural problems.
- Medical disorders / illnesses → Possibly physical, social or mental illnesses ?

* POSSIBLE CORRECTIVE ACTIONS

CORRECTIVE ACTIONS Consider :-
- Counselling
- Training
- Job Redesign
- Relocation or Job Change
- Peer Group pressure

COUNSELLING (see OUTLINE)
- Who should counsell the p.p. ? → Career counsellor for vocational guidance! / Supervising manager ? / Personnel Dept. ? / Medic (Doctor or Psychologist) ? / Specialist ? / Someone else ?
- Who records & reports outcome of counselling session, & to whom ?
- What reporting back procedures?

TRAINING
- Is this the answer to fill the gap?
- Will it be enough ?
- Does improvement require change of skills or attitudes ?
- Expect further fall off after training before the gap closes ?

JOB REDESIGN
- Delegate job planning to p.p. so more of self is invested in it.
- Will changing the job environment help ?
- Can you add interest or variety ?
- Give p.p. more control eg. vary pace of job.
- Give more feedback on performance & consequences of the job.

PEER GROUP PRESSURE
- Can they be persuaded to accept responsibility for the p.p. ?
- Formally or informally ?
- Can you increase dependence on the peer group & vice versa eg. as part of an autonomous work group.

RELOCATION OR JOB CHANGE
- Move p.p. to a different job to match his/her abilities.
- Promote 'upstairs' to become someone else's problem.

COUNSELLING THE POOR PERFORMER (p.p.)

* WHEN TO COUNSEL
* WHY COUNSEL ?
* THE COUNSELLING INTERVIEW

WHEN TO COUNSEL

- If the p.p. is solely your concern
- Counsel after you have established:
  - the standards of performance expected,
  - documented proof of a performance discrepancy,
  - no other disciplinary action is pending,
  - standards were realistic & had been communicated to the p.p.
  - relevant company procedures have been checked with the personnel department.

Who else might be considered? Who else might get involved?
- the Union,
- other managers,
- the work group,
- Personnel Department,
- etc.

- Communicate time & location verbally (preferably face-to-face) to the p.p.
- Normal interview courtesies & discipline will apply.

WHY COUNSEL ?

- If ....
  - you have established that a performance problem exists,
  - you have identified reasons for the performance discrepancy, and ....
  - you have identified ways of reducing the performance discrepancy, then ...
- You want the p.p. to accept ownership of the problem, &..
- You want to promote 'self-organised' improvement.

* STRATEGIES FOR THE INTERVIEW
* GUIDELINES FOR COUNSELLING

- Prepare your questions & strategy beforehand.
- Be sure of the performance standards expected of the p.p.
- Agree with the p.p.
  - there is a perf^ce discrepancy,
  - the extent of the discrepancy,
  - the responsibility for this performance discrepancy,
  - action to reduce it,
  - a time scale for action & a method of monitoring,
  - date for a follow-up meeting.
- Be firm & supportive throughout.

How would they advise some other person with this same problem?

Possibly by reference to historical data &/or norms (written or unwritten) or by agreement with the p.p.'s peer group.

- Pay attention to questioning techniques.
- Keep 'personality' out of the conversation.
- Deal with the problem behaviour and not the person
- Make it easy for the p.p. to do what you want

Avoiding 'loss of face' if possible.

It is easier to measure future successes (if any) in behavioural terms.

Behaviour is more easily changed than personality or attitude.

N.B. This outline assumes that you believe counselling is the best approach to the performance discrepancy you have identified. Other approaches are feasible.

THE CASE FOR PERFORMANCE ENGINEERING (1)

* WHAT IS PERFORMANCE ?
* HOW TO MEASURE PERFORMANCE
* THE ANALOGY WITH ENGINEERING

PERFORMANCE is a transaction involving BEHAVIOUR and a consequence of that behaviour ⇒ ACCOMPLISHMENT

HOW TO MEASURE PERFORMANCE
- Tests of achievement ? → May rate people's ability to perform overtly & accomplish something, but is no measure of one's behaviour (which is mainly covert) or potential.
- Measure their Potential for Improving Performance (P.I.P.)

P.I.P. = Exemplary Performance / Typical Performance

or = Best possible (now) / Average Performance

If average performance is exemplary, P.I.P. ratio is 1·0
If less than exemplary, P.I.P. ratio is > 1·0

ENGINEERING ANALOGY
- In manufacturing we might engineer raw- or part-finished materials ⇒ added value (or worth)
- In business, we might engineer circumstances or situations ⇒ valuable performance (accomplishments)
- In employees we might engineer their behaviour ⇒ valuable performance (or accomplishments)

'WORTH' increases, as value of accomplishment increases OR the cost of a behaviour change decreases. (If cost of behaviour change is high - it is not worthy performance.)

By means of :
- training,
- better tools,
- better motivation,
- more information about performance,
- something else.

- If engineering cost is too high, 'worth' is reduced (& profit is also reduced).

When engineering materials, business or 'behaviour for performance' we must consider the context of VALUE FOR COSTS

* MEASURING ACCOMPLISHMENTS

MEASURING
- All accomplishments are measurable (even artistic or aesthetic performances) → The difficulty may lie in HOW to do it.
- At work people's accomplishments may vary greatly but research into their behaviour repertoires may show small differences → Correcting SMALL differences in behaviour repertoires may achieve large improvements in accomplishments.

* WHO IS COMPETENT ?
* FIRST THOUGHTS

COMPETENT PEOPLE
- Create valuable results without excessively costly behaviour.
- Perform 'overtly' in adding 'worth' to something. → Accomplishments alone have direct value & it is what we pay for.
- Are judged (subjectively) to be competent by their peers.
- Actually, people are NOT competent, their performance is

FIRST THOUGHTS
- We should seek to increase value in people's accomplishments before investing in the costs of behaviour changing.
- We must study exemplary performance to see what (s)he is doing right to achieve this performce. Others may then attain with minimal behr. change.
- There is no need to measure behaviour until we have measured accomplishments.

(AFTER T.F.GILBERT)

∝ Issue 1

THE CASE FOR PERFORMANCE ENGINEERING (2)

CONDITIONS FOR HUMAN COMPETENCE

- TO IMPROVE GENERAL PERFORMANCE (COMPETENCE)
- IS THERE A NEED TO IMPROVE PERFORMANCE ?
- THE COMPONENTS OF COMPETENT PERFORMANCE

TO IMPROVE COMPETENCE
- Identify what variables enable one person to exhibit exemplary performance.
- Identify how we bring another person upto exemplary performance.
- Ideally strive to bring another person's P.I.P. down to 1·0

N.B. The more incompetent a person (or group) – the larger the P.I.P. & the easier it is to improve performance.

IS THERE A NEED ?

A performance audit should show,
- Why deficiencies do exist in a person's (or group's) performance.
- What behavioural deficiencies cause high P.I.P. ratios.
- What strategies are most effective in yielding worthy results at lower cost to the company.

(see footnote)

- P.I.P.s may be devised for all departments from organisation.
- Best worked from top down.

COMPONENTS FOR COMPETENCE
- A supportive environment.
- One's behaviour repertoire

- Behaviour is the response of a person to a stimulus.
- It is one area for competence to develop.
- It may be altered directly or indirectly.
- For particular behaviours to persist they need to be rewarded.

ENGINEERING COMPETENT PERFORMANCE

Empirical data on Performance may be organised according to this MODEL

Are their TOOLS the best for doing this job?

Is performance DATA given to employees?

Have they the INCENTIVE to do well? How may they be improved?

	NEEDS		
	INFORMATION	RESPONSE	MOTIVATION
ENVIRONMENTAL SUPPORT	1. DATA ON PERF^{CE} REQ^{TS}	2. INSTRUMENTS & TOOLS	3. INCENTIVE TO DO WELL
BEHAVIOUR REPERTOIRE	4. KNOWLEDGE TO DO JOB	5. CAPACITY FOR THE WORK	6. MOTIVES TO DO WELL

1978 T.F. GILBERT

What would MOTIVATE them to perform well?

Have they the KNOWLEDGE to do the job?

Can the operator do the job?

Changes here are usually cheaper & easier to implement

Changes here are in a person's repertory of behaviour

A form of dynamic equilibrium exists between the six factors. To alter one may significantly change one or more of the others. The change may be BENEFICIAL or DETRIMENTAL to their performance.

N.B. Never critically appraise a performer if (s)he cannot control his/her work circumstances.

* CONCLUSION :-
- Use the model to help you decide where to start asking questions about performance & identifying performance deficiencies.
- As a general rule, attention to environmental support will be more likely to improve P.I.P. ratios.
- Hold back on training until a performance audit has been completed. It is only one alternative to achieving greater performance, & is often the most expensive.

IMPROVING THE POTENTIAL OF COMPANY TRAINING ACTIVITIES (Some critical views of T.F. Gilbert)

* ASK QUESTIONS OF THE TRAINING DEPT./AGENCY
* CURRENT EVALUATION METHODS
* JUDGING PROFESSIONAL PERFCE POTENTIAL
* A MORE IDEAL SITUATION

QUESTIONS OF THE TRAINING DEPT. or AGENCY Mgt. should ask:-

- Is the training meeting a proven, MEASURED need ?
  - How was it measured ?
- To what standards are employees trained ?
  - Exemplary stds. ?
  - Who decided them ?
- Are the trainers competent ?
  - How was that competence measured ?
- What is the true cost of training
  - Courses v. on-the-job trg.
  - Is the company getting value for money ?
- What determines course length ?
- Could the training staff conduct performance audits ?
- Do performance measures show that training is paying off for this company

CURRENT EVALUATION

- Commonly a cursory look, judged on qualifications of staff & .....
  - size of training effort,
  - number of hours,
  - no. of trainees passing out,
  - word of mouth recommendation.
  - (list of firms using them - agencies)
- OUTPUTS - generally consist of behaviour changes/improvements → Not necessarily performance improvements.
- BUT - do they ever fail ? → Conversely - do they succeed ?
  - are their accomplishments un-measurable ? → Or, un-measured ?

JUDGING PROFESSIONAL PERFORM CE POTENTIAL

- Current methods → Behavioural histories
  - Job references, are they objective enough ?
  - Academic qualifns, are a measure of a different sort of performance to training activities.
  - Verbal behaviour at interviews can be learned & is an unreliable measure of competence.
- A better method

Publish performance measures
- Useful to clients who then can identify malpractice.
- Would improve perfce of those professionals.

Would meet many political obstacles; would take much time & thought but is not impossible & it would provide large returns.

A MORE IDEAL SITUATION

- Senior management sets standards of job performance for training staff → Senior management involvement will :-
  - plan that short-term accomplishments are compatible with long-term aims.
  - Incidentally, set incentives to perform well.
  - Aim to give the trainers a stake in the performance they are engineering.
- Turns the Training Dept. into a Performance Dept.

NEW RESPONSIBILITIES

- Assessment of performance opportunities.
- Development of performance systems.
- Deliver & implement performance systems.

- Output is now performance improvement as well as behaviour improvement.
- Commence performance engineering studies by the training staff. → A performance engineer need not be a competent performer of each skill. Experts don't always make good teachers.
- Budget handsomely while staff develop expertise in performance engineering.
- Assign new areas of responsibility.

ALTERNATIVES TO TRAINING (TO IMPROVE PERFORMANCE)

* WHAT TO DO WITH THE TRAINING DEPT.?
* ALTERNATIVES TO TRAINING
* DIRECTING COMPETENCE
* UNSATISFACTORY FEATURES OF TRAINING METHODS

THE TRAINING DEPT.
- Abandon it ? → Unrealistic - it moves costs elsewhere where they are likely hidden & unbudgeted.
- Possibly change it to a PERFORMANCE DEPT. with revised responsibilities.

ALTERNATIVES TO TRAINING

Training alone is a costly enterprise. Performance is the 'end' - behaviour is the 'means'. Change behaviour by :-
- Guidance. → Well-designed guides assist human memory reducing competition for memory facilities.
- Performance aids. → They improve performance without any need for training eg.
  - wall posters,
  - safety clothing,
  - self-adhesive labels,
  - etc.
- Redesign tools or use different materials. → Makes job easier to learn. Makes tools easier to use.
- Give immediate feedback/ reinforcement of correct response → - Design an information dissemination system covering performance expectations & achievements.

DIRECTING COMPETENCE

Requires information :-
- Confirmation of performance results
- Direction to perform
- Use INDUCTIVE tactics or training

UNSATISFACTORY FEATURES :- use in isolation or to excess of...
- Skill-bound, (abandons theory - 'just learn what you have to do !!')
- Theory-bound, (an academic approach unrelated to reality)
- Inductive-bound (people know why they're doing a task but don't know how)
- Media-bound (do everything with A/V aids but forget to practice the skills being shown.)

...methods of training

INDUCTIVE TACTICS
- Tell the performer what the task is about & the consequences of good & poor performance.

INDUCTIVE TRAINING is powerful in that it.....
- can change well established points of view & superstitions.
- enables employees to take as important some hitherto seemingly unimportant fact.
- arouses an interest in performance which did not formerly exist. (It is assisted by films, case-studies, etc.)

JOB AIDS eg.
- Algorithms, to direct decision making.
- Directories, to ensure sequence of actions.

GUIDES
- Reduce the probability of error when performing complex tasks.
- Similarly with tasks which are performed infrequently.
- Necessary in tasks where error-free performance is essential eg. pilot's flight checklist.

> 'The best tactics for reducing the true time & cost of training are identical to those required to improve its effectiveness.'
> T.F. Gilbert (1978)

Contents

PART 1 MANAGERIAL SKILLS

Getting results from People	3.01
Getting your own way	3.02
Asking the right questions	3.03
Planning	3.04
Directing & Controlling	3.05
Giving Effective Orders (& Instructions)	3.06
Making Managerial Choices	3.07
Assertiveness - Giving & Receiving Criticism	3.08
Assertiveness - Handling Negative Feelings	3.09
Legislative Outlines for Line Managers	3.10

PART 2 QUALITY

The Pursuit of Quality	3.11
Quality Audits 1	3.12
Quality Audits 2	3.13

PART 3 PROBLEM SOLVING & DECISION MAKING

Problem Solving	3.14
More Problem Solving Considerations	3.15
Decision Making	3.16
People Factors in Decision Making	3.17
Stress from Decisional Conflict	3.18

PART 4 PERSONNEL MANAGEMENT

Introduction & Induction to Jobs	3.19
Employing New Graduates	3.20
Managing the High Performer	3.21
The Value of People	3.22
Discipline & Morale	3.23
Followership 1	3.24

PART 5 ORGANISATION

Consent & Control	3.25
Power	3.26
Power in Organisations	3.27
Origins of Power	3.28
Political Language - in Organisations	3.29
Symbolic Actions - in Organisations	3.30
Mapping your Motivational Patterns	3.31
Uses for Motivational Patterns (S.I.M.A.)	3.32
Introducting Management by Objectives	3.33
Essentials of Management by Objectives	3.34
Preparation of International Managers	3.35
Managing Across Cultures	3.36
Cross-Cultural Organisational Differences	3.37

PART 6 ADVERTISING & MARKETING

Evaluation of Attitudes from Surveys	3.38
Fixing the Price	3.39
Colour and the Role of Market Research	3.40
Getting Results from Advertising Copy	3.41

PART 7 TRAINING & LEARNING

Ways of Identifying Learning Needs	3.42
The Case for Self-Directed Learning	3.43
On-the-Job Management Development	3.44
The Climate for Management Development	3.45
Getting the best out of Courses	3.46
The Character of Action Learning	3.47
Super Learning	3.48
On Changing your Job	3.49
Ways of Encouraging Creativity	3.50

PART 8 KEYWORD INDEX

Keyword Index	pp 51-54

Key to numbers used ..... first digit = Book Number
after decimal point = Page Number

A

Absenteeism 1.32
Accomplishments , job 1.49
Action learning 3.47
Action, symbolic, in organisations 3.30
Advertising 1.13 ; 1.14 ; 2.32 - 2.36
Advertising ,and packaging 1.13 ; 1.14
,placing 3.41
,Principles of 2.33
,recruitment 1.31
,Setting Objectives 2.32
,Writing copy 2.34 - 2.36 ; 3.41
Aids , to Performance 1.41 ; 1.43
Aims , security 1.02
Alternatives to Training 2.50
Analysis , needs 2.22
, self 3.42
Appraisal 3.42
Appraisals , handling 2.05
Asking the Right Questions 3.03
Aspects of Negotiation 2.38
Assertiveness 2.01 ; 2.02 ; 3.08 ; 3.09
Assertion Training 2.01 ; 2.02
Assertive behaviour 2.02 ; 3.09
Attitude , to Security 1.01
Attitude Surveys 3.38
Attributes, personal, for learning 3.43
Audits , marketing 1.12
, security 1.01 ; 1.10
, Quality 3.12 ; 3.13
Auditors, role of quality 3.13
Authority 3.25
, establishing 3.23
, in Organisations 1.36

B

Basics of Negotiating 2.37
Behaviour modelling 2.25
, shaping 1.39
Biography mapping 3.31
Boss , as developer 3.44 ; 3.45
, involvement in courses 3.46
Boundary Management 2.10
Brainstorming 3.50
Buyer Resistance , Overcoming 1.21

C

Change 3.04
Changing your job 3.49
Choices 2.14 ; 2.18
, Making Managerial 3.07
Climate for Management Development 3.45
Colour 3.40
Colour , in packaging 1.17
, in selling 2.31
, trends 3.40
Company handbook 3.19
, Introduction to the 3.18
Competence , Conditions for 2.48
, directing 2.50
Computers , used in problem solving 3.15
Computer based Training 1.26
Computer Security 1.07 - 1.09
Constraints 2.14 ; 2.18
Consent & Control 3.25
Control , and consent 3.25
Co-ordinating 3.05
Copy , Writing Advertising 2.34 - 2.36
Counselling the Poor Performer 2.46
Courses, Getting the best from 3.40
Creativity 3.50
Criticism , Giving & Receiving 3.08
, functions of 3.08
Culture 3.25
, Managing across 3.36 ; 3.37
, organisational 3.30
, shock 3.19 ; 3.35
, understanding different 3.36

D

Decision making 3.16 - 3.18
Decisions , types of 3.16
Demands 2.14 ; 2.18
Delegation , planned 3.44
Departmental induction 3.19
Development , self 2.21
, Training 2.19
Directing 3.05
Disaster Planning 1.10
Discipline 3.23
, & Morale 3.23
, procedures 3.23
Dismissal & the Law 1.35
Distance Learning 2.22 ; 2.23
Documentary Security 1.05
Domain , Job 3.07

E

Effective behaviour 2.13
, orders 3.06
Effective Security 1.02
Effectiveness , managerial 2.13
Evaluating Sales Promotions 2.27
Exchange relationships 3.01 ; 3.25
Experiential Learning 2.19 ; 2.24
Expert , Becoming an 2.21

F

Feedback , from colleagues 3.42
Feelings , Handling Negative 3.09
, positive & negative 3.09
Followers 3.24
Followership 3.24
Forecasting 3.40

G

Getting your own way 3.49
Graduates, Employing New 3.20
Grievance handling 2.05
Groups , follower 3.24
, in decision making 3.17
, in problem solving 3.15

H

Handbook , company 3.19
Handling uncertainty 3.28
High Performers , Managing 3.21

I

Induction courses 3.20
, to jobs 3.19
Industrial Relations 1.34
I.R. , dismissal 1.35
, & security 1.06
Information collecting 3.38
Influencing , interpersonal 3.02
Instructions, effective 3.06
Interactive Skills 1.37 - 1.39
International Managers 3.35 - 3.37
Interview Procedure , Recruitment 2.44
Interpersonal Influencing 3.02
Introduction to Jobs 3.19

J

Job accomplishments 1.49
Job , Changing your 3.49
, Domain 3.07
, Modelling 1.46
Jobs , Introduction & Induction 3.19

K

Key Results Areas 3.05 ; 3.33

L

Language , Political, in organisations 3.29 ; 3.30
Leadership 2.10 ; 3.24 ; 3.29
Learning 1.25
, action 3.47
, computer based 1.26
, Distance 2.22 ; 2.23
, experiential 2.19
, managerial 3.43
, methods 2.16
, needs 3.42
, self-directed 3.43
, Styles 2.20 ; 2.21
, Super 3.48
Legislation , for line managers 3.10
Line organisation 3.05

M

Management by Objectives 3.25 ; 3.33 ; 3.34
3.42
M.b.O., advantages of 3.34
, Essentials of 3.34
, Introducing 3.33
Management , Boundary 2.11
Management Development 2.10 ; 2.13 - 2.17
2.19 ; 2.24 ; 3.43 - 3.45
, home influences 3.45
, On-the-job 3.44
Management training 3.35
Manager's Roles 1.33
Managerial Choice 2.14 ; 2.15 ; 3.07
, learning 3.43
, Skills 2.16
Market Analysis 3.40
, Research 1.18 ; 2.26 ; 3.40
, Share & Segmentation 2.26
Marketing 1.11 - 1.24 ; 2.26 - 2.31
, Planning 1.11
Matrix organisation 3.05
Modelling Behaviour 2.25 ; 3.44
, Job 1.46
Morale , Discipline and 3.23
, establishing 3.23
Motivation 3.02 ; 3.42
Motivational Patterns 3.31 ; 3.32
, mapping 3.31
, Uses of 3.32

N

Needs analysis 2.22
Negotiation , Aspects of 2.38
, Basics of 2.37
Networks , types of 3.02

O

Objectives , advertising 2.32
, correct words 1.28 ; 1.29
, for interaction 1.38
, identifying 3.33
, Management by 3.25 ; 3.33 ; 3.34
3.42
, performance 1.47
, planning 3.04
, setting 3.33
, training 1.27 - 1.29
Obstacles , dealing with 3.14
Office Security 1.05
Orders , Giving Effective 3.06
, verbal 3.06
, written 3.06
Organisation , line 3.05
, matrix 3.05
, nature of 3.24
, staff 3.05
Organisational climate 3.01
, culture 3.01 ; 3.29

P

Packaging , advertising 1.13 ; 1.14
, to sell 1.13 ; 1.14 ; 1.17
, decisions 1.16
, design 1.16 - 1.18
, materials 1.14 ; 1.15
, & market research 1.18
Paralanguage 2.05
People , Getting Results from 3.01
, Factors in Decision Making 3.17
, Value of 3.22
Personality 2.05
Personnel Management 1.40 ; 3.10
, Manager , role of the 3.22
, security 1.04
Performance 1.41 - 1.50 ; 3.11
, aids 1.41 ; 1.43
, appraisal 1.44
, discrepancies 1.41 ; 1.42
, engineering 2.47 ;2.48
, improving 3.46
, management 1.45
, objectives 1.47
, obstacles 1.45
, problems 1.41
, pyramids 1.47
, system 1.42
, training 1.48
Performers , high 3.21
, poor 2.45 ; 2.46
Peter Principle 3.49
Planning 3.04
Policing , internal 1.03
, second line 1.01
Political Language in Organisations 3.29
Politics , company 3.02
Poor Performers 2.45 ; 2.46
, Counselling 2.46
, Dealing with 2.46
Power 3.26 - 3.30
, distance 3.05 ; 3.24 ; 3.37
, from conflict 3.26
, in negotiations 2.38
, in organisations 3.27
, formalised 3.28
, legitimate 3.27
, Origins of 3.28
, personal 3.26
, pointers to 3.27
Price , Fixing the 3.39
Pricing , objectives 3.39
, policies 3.39
, strategies 3.39
Problem Solving 3.03 ; 3.14 ; 3.15
,techniques 3.15
, use of computers for 3.15
Problems , types of 3.14
Procedures , disciplinary 3.23
Promotions , sales 2.28 - 2.30

Q

Quality , The pursuit of 3.11
Quality Audits 3.12 ; 3.13
, benefits of 3.12
, procedures 3.13
, processes 3.13
, purpose of 3.12
Questions , Asking the Right 3.03

R

Recruitment Advertising 1.31
, Interview procedures 2.44
Reducing Stress 2.39 - 2.43
Reprimanding 2.05
Resistance , Overcoming Buyer 1.21
Right Questions , Asking the 3.03
Rights , Assertive 3.08
Role of Colour in Selling 2.31
Roles , establishing 3.23
, Managerial 1.33

ISBN 0 947900 02 0

S
Sales Promotions 2.27 - 2.30
, techniques 2.30
Scapegoating 3.30
Security 1.01 - 1.10
, & Industrial Relations 1.06
, aims 1.02
, Auditing & Disaster Planning 1.10
, Computer 1.07 - 1.09
, Documentary 1.05
Self analysis 3.42
, Development 2.21
Selling , techniques 1.19 - 1.24
, Top-tier 1.22 ; 1.23
Setting Objectives 2.32 ; 3.04 ; 3.34
Share , market 2.26
S.I.M.A. patterning 3.31 ; 3.32
Skills , Interactive 1.37 - 1.39
, Study 1.30
Strategic Management Development 2.24
Stress 2.39 - 2.43 ; 3.18
, alleviating 2.40
, coping with 2.41
, countering 2.39
, decisional 3.18
, potential sources of 2.42
, reducing 2.43
, & women managers 2.42
Study Skills 1.30
Styles , Learning 2.20 ; 2.21
Successful Managers 2.17
Superlearning 3.48
Supervisors , training 3.19 ; 3.20
Surveys , attitude 3.38
S.W.O.T. analysis 3.05 ; 3.33
Symbolic Action in Organisations 3.29
Synectics 3.50
Systems 2.03 ; 2.04

T
Talking with Subordinates 2.05
T.A.R.G.E.T. in decision making 3.17
Teams 2.06 ; 2.07
Team-Building 2.06 - 2.09
, roles 2.06
, sizes 2.07
Thinking 3.03
, process 3.09
Training 1.25 - 1.30 ; 2.19 - 2.25 ; 2.49 ; 2.50 ; 2.01 ; 2.02
, alternatives to 2.50
, assertion 2.01 ; 2.02 ; 3.09
, Computer Based 1.26
, Development 2.19
, evaluation 2.49
, for Performance 1.48
, inductive 2.50 ; 3.19
, improving potential of 2.49
, Objectives 1.27 - 1.29
, outdoor 2.19
, security 1.06
, supervisors 3.19 ; 3.20
, supervisory 2.25
Transition , job 3.49
Transactions 2.04

U
Uncertainty , handling 3.28

V
Value Analysis 1.50
of People 3.22
Verbal orders 3.06
Vetting , Security 1.04

W
Winning , The Business of 2.10
Women Managers , Stress & 2.42
Work sharing 3.07
Written Orders 3.06

Z
Zero Defects 3.11
Zero defects policy 3.11

GETTING RESULTS FROM PEOPLE

COMPANY OBJECTIVE - to maintain a viable enterprise for the majority of the workforce. Machiavellian view, the end justifies the means.

* BUILDING A CONTENTED WORKFORCE
* DEVELOPING THE ORGANISATIONAL CULTURE/CLIMATE (O.C.)

BUILDING CONTENTMENT

- Working for an organisation is an 'exchange relationship' where employee & organisation benefit
  - Employees relinquish certain rights & freedoms in exchange for their work & remuneration.
- If the managers & the 'managed' are both satisfied, both are doing something right.
- Money isn't everything but money is IN everything so the financial aspects must be right
  - Everything has a cost (or value) attached.
- Non-financial motivators help
  - Recognition; consultation; status; pensions; holidays; a pleasant environment; etc. will all build up job satisfaction.

DEVELOPING THE O.C.

- Getting it right has pay-offs
  - The workers are self motivating.
  - Discipline, absenteeism, accidents & other personal problems are minimised.
  - Productivity is raised.
- The O.C. is the way of life within the organisation
  - As the company prospers, so should the workforce.
  - A good organisation recognises key elements in employee satisfaction & accentuates them to persuade the workforce they are well off eg.
    - No redundancies!
    - No lay-offs!

    (Use natural wastage to reduce workforce & sub-contract when pressed for production expansion.)
- Using the O.C. is one way to dominate (the workforce) by stealth
  - Often the workforce believe they are better of without unionisation.
  - So management are not confronted with a rival power.
- However a company's O.C. takes years to develop.

* REPREHENSIBLE MANIPULATIVE METHODS

- Intimidation of individuals - using authority of one's position; verbal attack or through exercise of power.
- Control of information flow to ensure only your views are aired & decisions passed.
- Divert attention from key issues & absorb their time & energy in trivia.
- Use meetings to give an impression of consultation while manipulating the agenda items & time allowances.
- Weight committees with like-thinking members to ensure the outcome will be favourable for you.
- Consult & listen to the views of others before delivering your decisions.
- Seek the 'offer-they-cannot-refuse' in negotiations in return for giving up other concessions.
- By manipulating union legislation.
- By setting difficult objectives.

(These can only be used with care if they are not to appear to endanger the employee's perceived security & self-respect.)

GETTING YOUR OWN WAY (INTERPERSONAL INFLUENCING)

* MOTIVATION OR MANIPULATION ?
* WHEN TO BE 'POLITICAL'
* BEING POLITICAL - FIRST STEPS
* ALTERNATIVE ACTION

MOTIVATION or MANIPULATION ?
Depends upon the interpretation of the receiver (R_x).
- Motivation - Rx influenced in a positive & favourable way.
- Manipulation - Rx feels influenced in a seemingly unfavourable way → Actions were perhaps not well planned or well conducted.

POLITICS is getting done what you want done, preferably with the full permission, approval & co-operation of those around you. Influencing others to your point of view. Politics is not all negative & undesirable.

WHEN TO BE POLITICAL
- With superiors & peers where you lack authority - use politics.
- With subordinates, use the power & authority of your position only. Don't resort to politics.
- Whenever you wish others to accept your ideas, do what you want or re-examine their attitudes - to improve performance or further your career or an institutional change.

BEING POLITICAL - FIRST STEPS
- Identify those around you in powerful or influential positions who need to be influenced (directly or indirectly)
- Make them feel comfortable
- Gain their acceptance & recognition
- Join their network

- They may not be obviously 'visible' (at first) or concerned.
- You may not be able to exert power or authority over them directly.
- Similarly, you need not be obviously & visibly doing things to influence them. They may see it as threatening.

- Get known & be recognised as having a worthwhile contribution to make to the network.
- Get 'sponsored' by a network member.
- Adhere to network norms - fit in.
- Be patient work slowly. (Time will bring about change.)

- Identify what values, attitudes & behaviours they accept, 'tolerate' or manage.
- Don't do anything which may threaten these values, attitudes & behaviours while gaining their trust & confidence.
- As a longer term consequence you may lose ownership of the idea you wish to pursue.

- This means aligning with them. To get on with people you may have to join them. Join their network if you can. Most individuals belong to informal interest groups within an organisation apart from their role.
- Consider how long this may take vis-a-vis your objectives.

TYPES OF NETWORK

- **IDEOLOGICAL** - often in form of pressure gps. Common link may be political/social objectives. Internal conflict over objectives is not uncommon.
- **PRACTITIONER NETWORKS** Members have similar professional &/or training interests. They institute professional development & practice to which members adhere.
- **PEOPLE-ORIENTED** exist for the sake of members only eg. dominant values may be religious.
- **POWER NETWORKS** weild substantial influence or wish to be influential. Membership by invitation & not necessarily on merit or equal opportunity.

ALTERNATIVE ACTION
If you cannot influence others, at least prevent them from over-reacting & opposing you by :-
- Withholding info? (short term),
- Withdraw or reduce your visibility, keep a low profile.
- Pay close attention to timing your activities & releasing information.

ASKING THE RIGHT QUESTIONS

* EFFECTIVE THINKING
* ASKING THE RIGHT QUESTIONS
* SOLVING PROBLEMS WITH QUESTIONS

EFFECTIVE THINKING - Managers should think more.

- When 'managing to win', constant thought is required.
- The imposition of order & the organisation of events is a thinking process
- Effective thinking seeks REALITY in what is happening inside & outside the company or organisation.
- Effective thinking, by asking questions, prevents problemsforming

→ - A good question - are your managers permitted time to think?

→ - Planning is thinking.

→ - Use the 'wh' words (who; which; where; when; what; & how)

→ Get the questions perfectly right & they answer themselves.
- Get the questions wrong & problems develop.
- Thinking turns problems into opportunities for moving forward.

ASKING THE RIGHT QUESTIONS

- Good questions come from acute, intelligent analyses.
- A company should ask itself :-
  - Why are we doing it this way?
  - do we have to?
  - what alternatives are there?
  - do we have to do it at all?
  - are we & our rivals competing on the same terms?
- Right questions can be asked without fear of being fooled by the answers

→ FACT
- Most profitable inventions have been arrived at while solving another question? (eg. why don't cameras have a built-in flash mechanism instead of troublesome attachments?)

→ - Basic questions asked from the position of basic understanding.

SOLVING PROBLEMS WITH QUESTIONS

- In most industries, managers diagnose deviations from standards as problems.
- FORD (U.K.) found some major problems disappeared when they stopped trying to solve them
- Try the ploy of ignoring the problem & treating the situation as a question.
- Next, find the answer to the question.

→ FACT
- It released a lot of manager's time & energy.
- It reduced expenditure.
- Labour problems were reduced.
- The company moved from loss-making into profit.

PLANNING

* THE PLANNING PYRAMID
* WHY PLAN ?
* TYPES OF PLAN

PLANNING is a formal process by which specific objectives are set, & detailed ways of accomplishing these objectives are established. It is the first in the sequence of managerial functions.

PLANNING PYRAMID Planning will go on at all levels in the organisation :-
- **ORGANISATION** - has broad objectives in general terms.
- **FUNCTIONAL DEP'Ts** - have sub-objectives & derivative plans for their own areas of influence (taken from the organisation's plans)
- **SUPERVISING LEVEL** - sub-objectives are very specific & the unit's plans more detailed but are no less significant for all that. → -Who does what ; when ; how & where.

WHY PLAN ?

In business, change is inevitable. Organisations must adapt or die.
- There is a need to plan to cope with change
- Organistions must be flexible

WHAT CHANGES ?
- Economic situations change → · organisation needs new policies.
- Consumer preferences/ fashions / trends change → · needs new products, services, possibly in new markets.
- Financial situations alter.
- New technologies develop.
- Government legislation changes → · New codes of practice. · New production standards. · New environmental conditions. · New conditions of service ; Health & Service ; etc.

BEING FLEXIBLE
- Anticipate a need to change.
- Decide what is most likely to change.
- Be alert to changes in others (& the reasons)
- Consider the possible effects upon personnel; equipment ; the market ; competitors ; etc.

TYPES OF PLAN
- Duration
- Function
- Scope
- Others

BASED ON TIME
- 6 months is 'long-term' for supervisors, 'short-term' for organisations.
- Short-term plans — for lower levels of the organisation.
- Long-term planning (forecasting) is for senior levels.

FUNCTION may include :-
- Functional plans → · visualise inter-dept. relationships & plan to avoid conflict &/or problems.
- Contingency plans → · eg. disaster planning, for emergencies like strikes ; breakdowns ; fire ; power cuts ; etc.
- Financial plans.
- Preventive plans → · Anticipate problems, try to prescribe procedures for coping.

SCOPE May vary from :-
- inter-department,
- intra-department, or
- organisation wide.

AIDS TO PLANNING
- Charts eg. bar & gannt ; with the common element of TIME.
- Checklists.
- Network analysis Tech.^{ues}
- Old Plans - may be adapted to save time & effort. (Also proven)

POLICIES, PROCEDURES & METHODS
- Policies & procedures are also 'plans' designed to guide action. Are capable of interpretation.
- Methods are plans for operations & usually no discretion is permitted.

* THE PLANNING PROCESS

- Set out your objectives → - They must be specific :-
  - what to be accomplished & how.
  - attainable & reasonable.
  - consistent with organ^{n's} overall objs.
- Decide outline procedures
- Assign responsibilities.

Benefits of Good Planning
- More effective control.
- Greater economies of resources.
- Easier delegation.
- Better morale.

Consequences of Poor Planning
- Lower morale.
- Low career prospects.
- Lower quality outputs.
- Lower Job Satisfaction.
- Higher absenteeism & accident rates.

Reasons for Poor Planning
- Too little time available.
- Conflicting priorities.
- Lack of knowledge
- Pressure of work.
- etc.

DIRECTING & CO-ORDINATING

TO DIRECT - to direct the organisation's (or sub-units') efforts in a concerted operation towards the corporate objectives

TO CO-ORDINATE - to ensure all depts. (or functional sub-units) cooperate to ensure the achievement of their own & the corporate objectives

* S.W.O.T. = Strengths; Weaknesses; Opportunities; Threats.

* PRE-REQUISITES

To direct & co-ordinate work successfully assumes / implies / requires that the organ^{n}. has :-

- Identified itself clearly → - What business are we in?
  - What are we trying to achieve?
  - Have we performed our S.W.O.T.* analysis?
  - What is our market standing? (if we are selling)
- Set its organisational (corporate) objectives → And periodically reviewed & revised them.
- Identified the K.R.A.'s for functional subunits → Key Result Areas (K.R.A.'s) are commonly :
  - Finance,
  - Marketing,
  - Selling,
  - Production,
  - Personnel & Training
  - P. Relations
- Set sub-objectives for K.R.A.'s.
- Identified activities within K.R.A.'s.
- Set sub-objectives for these activities.
- etc.
- etc.

→ Where possible, include a figure or unit of measure by which to evaluate your assessment of whether sub-objectives are :-
- attainable, &
- have been reached.

eg. % ages; time limits; to what standards; frequency of occurrence; average value (numbers); etc.

* CO-ORDINATING

- All organisations subdivide responsibility from Managing Director down to operator so that tasks are identified for individuals & production is completed (or a service is provided) to the satisfaction of the 'end-user'.
- Profit-making organisations need to show a profit for the sum of these operations.
- Budget organisations must complete their operations without over-expenditure.
- To achieve this co-ordination, structures are established to control & co-ordinate activities & improve effectiveness

MATRIX ORGAN^{N}

Within the parent organ^{n}. another 'matrix' organ^{n}. could exist for transient activities, like special projects. Project teams of functional specialists are collected together. Head of the project liaises with department heads for release of specialist personnel. O.K. for speed of operation & higher cooperation.

LINE ORGAN^{N}

Orders, communication, & responsibility flow vertically down from superior to subordinate. A superior may have several subordinates whose activities need to be supervised & co-ordinated. Sometimes rigid organ^{ns} are slow to react to external changes in their environment.

STAFF ORGAN^{N}

A supervisor in the 'line' organ^{n}. is supported & advised by specialists called 'staff' who do not give orders or carry authority over 'line' personnel.

To improve effectiveness :

- Each employee should have a Job Description which defines clearly one's role; responsibility; authority; reporting requirements.
- Reduce the number of levels of authority to facilitate communication & reduce power-distance problems.
- Reduce the span of control of a leader to a maximum 10→15 persons.
- Keep the organisation as simple as possible.

- Group jobs together for economies of time, space, manpower, materials, etc. under one span of control.

GIVING EFFECTIVE ORDERS (& INSTRUCTIONS)

Tx - Transmitter
Rx - Receiver

DEFINITION - An order represents the assertion of one individual (or organisation) over another. Usually they are directed down the authoritarian, (hierarchical) structure

* PLANNING THE ORDER (INSTRUCTION)
* PREPARING THE ORDER (INSTRUCTION)
* CONTENT OF THE ORDER

PLANNING - is the order necessary?
WHEN? as the need arises & without delay.
WHY? to maintain control of a situation &/or initiate action.
AVOID - too many orders which will confuse the Rx. Too few orders when subordinates suffer from lack of direction.

PREPARING
- Establish a personal bond - address the Rx.
- Why this content? Get it right & accurate → - Is it practicable? - Have you the authority?
- Consider the Rx(s) → - Are they the most appropriate Rx's? - Can they execute the order? - With or without supervision? - What is the consequence of them NOT executing the order?
- What is the most appropriate ....
  - type of order,
  - mode of delivery.

CONTENT
- WHO, will do.....
- WHAT, and .....
- WHEN.

Possibly you may add ... WHERE HOW & WHY
- What is left to the discretion of the Rx(s)?
- Be brief accurate & to the point.

* TYPES OF ORDER
  - VERBAL
  - WRITTEN

ADVANTAGES OF VERBAL ORDERS
- Immediacy.
- Instant feedback eg. re- practicability of operation.
- Face to face.... non verbal communication extra.
- Person to person (telephone) .... paralanguage aids comprehension → Tone, pitch, stress, rate, etc.
- Can be questioned ... to aid understanding → follow-up in writing.

DISADVANTAGES
- Tx may be uncertain of his/her authority → not want the task.
- Can be challenged & control of the situation may be lost.
- Unsatisfactory for lengthy or complex requests.
- May be incorrect.

* OTHER ORDERS
  - STANDING ORDERS - permanent, written instructions applying to many persons for long periods of time, eg. emergency fire procedures.
  - REQUISITIONS - use standard ordering procedure, omits explanation, & has all relevant details to permit the accurate execution of the order.

ADVANTAGES OF WRITTEN ORDERS
- Permanence, may be referred to for improved understanding.
- Fine for complex or lengthy instructions.
- Can convey authority also.
- Fine where person-to-person contact is not possible / feasible.

DISADVANTAGES
- Impersonal, lacking immediate feedback, delays occur while seeking clarification.
- Slower to deliver & get response.
- Words capable of misinterpretation.
- Lack benefit of non-verbal reinforcement & paralanguage.

* RESULTS → following the execution of the order, what action will result? Checking? (WHO, WHEN, WHERE, HOW?)

MAKING MANAGERIAL CHOICES

CHOICES :- Activities the job-holder can (but does not have to) do within the job domain.

* WHAT DOES IDENTIFYING CHOICES MEAN ?

* OPPORTUNITIES FOR IMPROVING SELF MANAGEMENT

MEANS possibilities of....
- A larger job with more responsibility for personal growth.
- More 'freedoms' acquired for yourself
- Identifying possibilities to make the business grow.
- Opportunities to be proactive rather than always reactive.
- Chances to change the nature of your job

Adapt the job to you & not vice-versa.

Especially if you are an expert. Some freedoms come by circumventing policies & procedures.

SELF MANAGEMENT.... from
- Controlling the degree of fragmentation of day's work.
- Determining time usage eg. how much to spend on travel or at meetings.
- Planning more political activities eg. boundary mgt.
- Reducing unplanned 'reactive' activities.
- Adjusting the formality or informality of your work practices.

* OPPORTUNITIES FOR WORK-SHARING

- Work-sharing is **NOT** delegation.
- Work-sharing may be
  - Vertically
  - Horizontally

VERTICAL WORK-SHARING

Possible when there is, between boss & subordinate,.....
- No rigid status differential,
- No wide difference in knowledge & skills,
- No rigid demarcation relating to roles & tasks.

HORIZONTAL WORK-SHARING
- Quite common at senior levels where each would contribute knowledge & expertise to solve a common problem (TEAM ROLES).
- Leads to more effective use of collective talents & compensates for weaknesses.
- Widens work experience & increases opportunities for personal development.

* IDENTIFYING CHOICES WITHIN ONE'S DOMAIN OF OPERATION

Keeps the job domain flexible & permits job holders to become more effective managers by developing personal expertise & widening one's experience & perspective of the company.

ASSERTIVENESS - GIVING & RECEIVING CRITICISM

* THE PROBLEMS
* AIM OF CONSTRUCTIVE CRITICISM
* A GUIDE TO ASSERTIVE BEHAVIOUR
* RESPONDING TO CRITICISM

FUNCTION OF CRITICISM is to effect a change in the way a person performs a particular task - hopefully without engendering negative feelings but making it a constructive event.

THE PROBLEMS How can you :-
- Separate criticism about a job from criticism of the person ?
- NOT equate inadequacies in one aspect of a job to inadequacy of the whole person ?

AIM is to :-
- Assert your right to criticise their performance.
- Assert your need to see an improvement in their performance.
- Help a person to improve their performance.
- Not to attack the person and their rights.
- To behave assertively - & not aggresively or non-assertively.

A GUIDE TO ASSERTIVE BEHAVIOUR Where you are taking the initiative :-
- Prepare your thinking & get the facts of the situation right
  - Were performance standards clear ?
  - Can they do the job?
  - etc.
- Prepare a sound dialogue
  - Don't elevate or exaggerate issues.
  - What features (of task) are praiseworthy ?
  - What features merit criticism ?
  - What aspects of observable behaviour do you want to change ?
- Consider the approach
  - Set the scene & venue.
  - Announce the topic before the criticism.
  - Get to the point using sound dialogue, briefly & clearly.
  - Consider their rights & feelings.
  - How has their under-performance affected you?
  - How may it affect them ?
    - Use 'I' statements
  - What agreement will you seek concerning the criticism ?
- Meet the person
  - Remember the non-verbal features of the interaction eg. body language (positive) & gaze (eye contact)
    - too little is seen as non-assertive.
    - too much is seen as aggressive.
- Seek assertive responses
  - 'I will .....'
  - 'I agree ....'
  - 'I suggest ....'
- End the interaction on a positive note
  - What was agreed ?
  - How you will monitor progress.
  - How/when you will review the situation.

RESPONDING TO CRITICISM
In transactional analysis terms,
- Critical Parent often hooks Rebellious Child
- Consider your/their rights
  - If they have the right to criticise, they must accept you have rights too eg.
    - no public criticisms,
    - no personal attacks, etc.
- Use sound dialogue
- Use assertive responses for clarity
  - 'I'm not clear what.....'
  - 'I've made a mistake, but its not all bad....'
  - 'The criticism is valid what can I learn?'
  - 'The criticism is invalid, as I see it.....'
- Remember the value of non-verbal behaviour
  - Control gestures,
  - Return gaze,
  - Control voice,
  - etc.

Especially if criticism is unjustified or given aggressively.

ASSERTIVENESS - HANDLING NEGATIVE FEELINGS

* WHEN DO NEGATIVE FEELINGS OCCUR?
* TRIGGERING BEHAVIOUR
* HANDLING NEGATIVE FEELINGS

WHEN ?
- When anticipating a difficult interview or confrontation.
- When worried about another's reaction to you or your work.
- When frustrated by another's poor performance in some way.
- When about to ask for help or favours.

NEGATIVE FEELINGS are unproductive feelings which manifest themselves in worry; guilt; jealousy; depression; inadequacy; rage; extreme anger; etc. leading to ineffective behaviour.
POSITIVE FEELINGS are more productive eg. confidence; concern; annoyance; excitement; enthusiasm; etc. which can lead to effective behaviour.

The chain process which colours your feelings & behaviour repertoire.

Situation → Triggers → Your thinking Process → Affects → Your Feelings → Leads to → Your Behaviour

HANDLING FEELINGS Choose:-
- Internalise & suppress them
- Externalise & vent them
- Find a method of manipulating & controlling them.

- They don't go away.
- They create internal stresses which produce secondary physical stress symptoms.

- May relieve inner tensions.
- Can create problems with interpersonal relationships in the future.

Salesman's Philosophy
Whether you think 'YOU CAN...' or whether you think 'YOU CAN'T'..
- you're RIGHT!

* CONTROLLING THE THINKING PROCESS

- The thinking process which follows a situation is probably habitual, very rapid & difficult to deflect.
- The thinking process which precedes a situation is capable of being controlled & of being slowed down releasing better feelings leading to control of yourself & the situation.

- Many feelings & behaviours are learned. (Consciously or unconsciously)
- Some unproductive feelings may have some short-term payoffs which is why they become part of one's repertoire.
- Many unproductive feelings are the outcome of irrational thoughts which prejudge a situation & lead to exaggerations about inevitability of outcomes.

Challenge your faulty inner thoughts:
- Was it all so bad?
- Aren't you generalising from a single event?
- Aren't your expectations of perfection unrealistic?
- Can't they/you be wrong sometimes?
- Are you/they expected to know everything?
- Are they really that powerful?

Enables you to make use of:
- experience of similar previous situations,
- imaging of likely outcomes,
- anticipation of behaviour in yourself & others,
- consideration of the consequences of these behaviours,
- consideration of the rights of the people concerned.

A thinking intervention. Before the event:-
- Practice inner dialogues to sound 'I can....' alternatives.
- Describe your feelings about the situation now & in prospect & identify positive feelings.
- Take a deep breath, slow down your response & recall a sound 'I can.....' dialogue.

During the event:-
- It is unrealistic to believe you can change your reactions unless you have practiced the intervention strategies beforehand.

After the event:-
- 'Action replays' are impossible - 'if only I'd said.....' so,
- Think of the successes of the interaction.
- Think of your failures in the interaction.
- Learn from them & value the pre-event intervention strategy.

Issue 1

LEGISLATIVE OUTLINES FOR LINE MANAGERS

(FOR MANAGERS IN SMALL COMPANIES)

* SPECIFIC PRINCIPLES OF EMPLOYMENT
* DISCIPLINARY LEGISLATION
* OTHER NOTABLE LEGISLATION
* INCREASING WORKER PARTICIPATION

SPECIFIC PRINCIPLES

- Employees have a right :-
  - To know precisely their job & the terms & conditions applying to it. → i.e. the Job Description. Currently this is desirable but not obligatory as far as the employer is concerned.
  - To written terms & conditions (given to the employee within 18 weeks of commencing employment) → To include pay rates; hours; holidays & sickness entitlement; pension & insurance provision; termination conditions; discipline & grievance procedures; Health & Safety arrangements & procedures. (These are best collated into a handbook, regularly updated & issued to employees.)
- A senior person in the organisation should have clearly defined responsibility for personnel matters
  - To keep abreast of current legislation of an industrial nature as it affects employ^{t}.
  - To liaise with employees (or their elected representatives) on matters relating to their employ^{t} & conditions of service.
  - To review personnel procedures.
  - To handle dismissal procedures.
  - To oversee the maintenance of adequate records to include:-
    - starting date,
    - terms & cond^{ns} of employment,
    - records of performance, absences, promotions, etc.
    - participation in & outcome of appraisal & training initiatives accepted by employees (or their representatives.)
    - details of unsatisfactory work performance with warnings which may precede dismissal.

WORKER PARTICIPATION

- Consultative obligations are placed on employers encouraging participation concerning :
  - Health & Safety at Work
  - Proposed redundancies
- Many benefits may accrue through increasing worker participation
  - Safer working conditions,
  - More worker co-operation,
  - Improved working relations,
  - Greater job satisfaction,
  - Increased motivation,
  - Improved decision-making & commitment by workers through being involved.

PROPOSED REDUNDANCIES

- Requires that employee rep^{t} & the Department of Employment be involved.

HEALTH & SAFETY

- Workers are involved in the preparation & implementation of company policy.

DISCIPLINARY LEGISLATION

Sets out to identify employee behaviours which may result in:-

- Disciplinary action → Seems like a 'common sense' list but interpretation is always difficult eg. what constitutes insubordination?
- Dismissal without notice → Lays out a very serious list of 'offences' but great caution is needed in handling them. There is a need to follow procedures carefully in dealing with summary dismissal.
- Grievance & disciplinary procedures

GRIEVANCE PROCEDURES

Must be agreed by the parties concerned & strictly adhered to.

DISCIPLINARY PROCEDURES

Similarly follow procedural stages;- eg. following a disciplinary offence:-

- relaxed discussion & possibly a verbal warning (to be recorded on employees records).
- further discussion & a written warning (also recorded)
- second written warning & indication that dismissal may follow.
- termination of employment.

OTHER NOTABLE LEGISLATION

- Equal Pay & Opportunities → From Job Advert to Interview there must be no intent to discriminate between the sexes except in the list of special cases.
- Redundancy → Rules are now well established, underlining the need for accurate record keeping.
- Health & Safety at Work → Most line managers will be familiar with the Act as it applies in their own disciplines.
- Disclosure of Information

THE PURSUIT OF QUALITY

Z.D. = Zero Defects

* THINKING OF QUALITY
* FOCUSSING MANAGEMENT'S ATTENTION
* ESTABLISHING Z.D. QUALITY LEVELS
* SPIN-OFFS OF Z.D. POLICY

THINKING OF QUALITY

- Quality is an outcome of doing things the right way.
- Profit is an outcome of good quality goods/services..... ....effectively marketed
- Quality measures must also apply to inputs → Including management, materials; labour (skills); plant; etc.
- You are succeeding when every customer takes the quality for granted. → For example :-
  - Rolls Royce cars,
  - Kodak films,
  - Kelloggs products, etc.

FOCUSSING MANAGEMENT'S ATTENTION When 'best product/service' is the objective :-

- You must monitor the market & your competitor's products/services.
- You must critically assess & evaluate your own products/services.
- A 'zero defect' policy directs the drive for efficiency.
- 'Z-D' policy gives criteria to govern :-
  - design (to eliminate defects),
  - product planning,
  - purchasing (of quality components),
  - production activities → - One level only is acceptable.
  - Don't permit other 'acceptable levels' of quality.
  - It highlights the need for precise physical definitions of standards for each production operation.

ESTABLISHING Z.D. LEVELS

Features of the company & its management personnel are :-

- The discipline of the workforce → - The commitment to Z.D. will require that pressure be applied by someone on someone else to perform better. (This includes management.)
  - Insistent pressure should be applied by managers upon themselves as well as upon subordinates.
- Performing well is the responsibility of the performers
- If poor performance results from the failure of the workforce, then management is failing too →
  - Are training standards adequate?
  - Is their machinery good enough?
  - Are their materials good enough?
  - Are bought-in components of a high quality?
  - Are procedures/standards clearly defined?

    ↓
  - What else could be preventing top performance from being reached?

SPIN-OFFS OF Z.D. POLICY

- Whole company has built-in motivation when 'best product/service' applies → In time, people will discipline themselves to perform better, given the chance.
  - Loosen the reins, but keep them attached.
- A valuable identity in the market place.
- Good quality costs nothing → - Waste; scrap; rejects & reworking are what costs money.
- Quality commands a premium
- Product quality can be a strategic weapon in the struggle for market share, more so than price.

- Customers come to realise an expensive quality product may be the cheapest in the long term.
- 5% price premium will always exceed a 5% premium on production costs.

QUALITY AUDITS (1) (Q.A)

* WHAT IS A QUALITY AUDIT
* THE PURPOSE OF A Q.A.
* THE BENEFITS OF A Q.A.

WHAT IS A Q.A. ?
- A gathering of factual information concerning quality controls, processes, procedures, equipment, etc. based upon a non-biased assessment of objective evidence.

- Q.A.'s are often perceived as threatening - on a par with financial audits - with auditors probing to find faults & apportion blame.

PURPOSE OF Q.A.
- To assess variance (if any) between planned & actual contribution of a subunit to achieving defined quality standards.

BENEFITS OF Q.A.

Besides examining quality standards & methods of achieving them, also to :-
- Examine the validity of the standards,
- Check the equipment/methods used to maintain the quality standards,
- Suggest areas for improvement/training,
- Inspect managerial decision making in matters relating to quality,
- Assess appropriateness of the system, procedures & methods in use for quality control.
- Provide another opportunity for mgt. to communicate with other levels of the workforce.

If any variance is detected
- to deduce areas of deficiency,
- to make recommendations for changes or training,
- to provide documented information.

Consider
- How frequently to do a Q.A. ?
- When management will meet to consider the report.
- What corrective action is recommended?
- Who will monitor for improvement & change ?

* PROBLEMS OF PERFORMING A Q.A.
  - The company perspective
  - The worker's perspective

COMPANY PERSPECTIVE
- Who will do it ?
- Who can do it ?
- Who will/should see the findings ?

- Internal personnel or external consultant ?
- What will it cost to correct variances ?

WORKER'S PERSPECTIVE
- Do we know why its being done & the methods used ?
- Will we lose 'perks' if they are identified & procedures tightened ?
- They're finding fault.

- We should be told !
- Who will be blamed ?
- What's wrong with it ?
- Why all the fuss ?

QUALITY AUDITS (2) QA

* ROLE OF THE AUDITORS
* THE PROCEDURES
* THE PROCESSES

AUDITOR'S ROLE is to investigate the appropriateness & adherence to :-
- the standards laid down,
- the procedure for setting standards,
- the processes for enforcing standards.

- Is there a planned approach ?
- If not, why not ?

PROCEDURES
- Customers & clients strongly influence the quality requirements. Procedures need to be established to set standards to control quality

PROCESSES
- Refer to the methods used to provide goods or services to the customer/ clients requirements.

THE PEOPLE INVOLVED
- Are they competent / aware / trained?
- Have they the required physical attributes eg. eyesight ; strength etc?
- Is their attitude / morale such that high quality standards may be maintained ?

* EXAMINING PROCEDURES

Pertinent questions are :-
- Who formulated the procedures ?
- How / When / Where are they used ?
- Are they still relevant ?

- Are they understood ?
- Are they appropriate ?
- How often are they revised ?

* EXAMINING PROCESSES

Relevant questions concern :-
- The people involved
- The equipment used
- The goods themselves
- The paperwork (-is there a 'chaser' around ?)

PAPERWORK
- Do records exist ?
- Are they up-to-date ?
- Who fills them out ?
- To whom are they distributed ?
- Are they appropriate for control purposes ?

Copies to senior mgt.
to be released as appropriate
- What to do next with the information ?
- What action to follow ?
- Who monitors change & training ?
- Who checks that action has been forthcoming ?

THE GOODS
Study waste & re-work rates, customer complaints, etc.
- How much below standard ?
- Are brought-in materials up to standard ?
- Are they correctly stored ?
- Are all goods accounted for ? (worked & un-worked)
- Are they clearly identifiable ?

THE EQUIPMENT
- Is the equipment capable of producing to the standards required ?
- Is it being used correctly.
- Is it well / frequently maintained
- Is it being used in optimum circumstances eg. speed ; temperature ; humidity, etc.
- Has the appropriate equipment been identified ?

PROBLEM SOLVING

* WHAT TYPES OF PROBLEM MIGHT YOU ENCOUNTER?
* TACKLING PROBLEMS
* A 5-STAGE PROBLEM SOLVING PROCESS

TYPES
- Maintenance Problems
- Achievement Problems

MAINTENANCE PROBLEMS
- Caused by deviation of a person; machine; process; etc. from a standard or norm.
- The cause may be known or unknown → one solution may be to alter the norm to match the new outcome.

ACHIEVEMENT PROBLEMS
- Objectives are identified, or
- Ideals exist, but an
- Obstacle prevents them being attained.

i.e. PROBLEM = OBJECTIVE + OBSTACLE

TACKLING PROBLEMS
- Review the total situation & list all the problems.
- Identify priority problems

PRIORITY PROBLEMS
- Grow if they are ignored,
- Prey on your mind,
- May be the key to solving other problems,
- Don't react to stop-gap measures.

DEALING WITH OBSTACLES
- Go round them,
- Remove them,
- Demolish them,
- Neutralise them,
- Alter them,
- Buy them off,
- Overcome them,
- Prove they don't exist,
- Wait for them to go away, etc.

Define the Problem → What has DEVIATED? What is the OBSTACLE?

Describe the Problem → Use 'wh' words to produce open questions & stimulate analysis

WHO/WHAT is the problem? (Start to identify it) WHAT isn't it?
WHERE is the problem? (Locate the problem) WHERE isn't it?
WHEN is the problem? (Time it occured WHEN wasn't it?
HOW MUCH is the problem? (Identify extent)

Analyse the Problem

Look at the problem description for clues.
- what is DISTINCTIVE?
- what has CHANGED?

Generate Poss. Alternatives

Generate & test causes.
- how could the CHANGE have produced the DEVIATION?
- what is DISTINCTIVE about the OBSTACLE?

Verify

Test your solution against the most probable cause.

SAMPLE PROBLEM ANALYSIS SHEET

DEFINITION OF PROBLEM :-					
QUESTION	IS	COULD BE BUT ISN'T	DISTINCTIVE FEATURES	CHANGE	PROBABLE CAUSE
WHAT / WHO					
WHERE					
WHEN					
HOW MUCH					

MORE PROBLEM-SOLVING CONSIDERATIONS

* USE OF GROUPS IN PROBLEM SOLVING
* TWO MORE TECHNIQUES
* USING COMPUTERS

USE OF A GROUP ? Consider :-

- Is the problem of a strategic nature ?
- Have problems similar to this been solved before ?
- Is there a time factor ?

- Group problem-solving is useful for strategic problems in circumstances of high uncertainty.
- Group p-s linked with gp. decision making is usually superior to individual efforts unless you have gifted individuals.
- Very large groups refer p-s to subgroups, committees or working parties with a brief to submit black/white proposals for main group to vote upon.

Is this a 'routine' problem with a 'routine' solution ?
Check the nature of the earlier problem & the effectiveness of the solution chosen that time.

'YES' - in-depth research may not be possible.
- ideal solution may be impossible.
- group problem-solving may be too slow a process.

'NO' - seek an ideal solution by maximising the group's capabilities.

TWO MORE TECHNIQUES

- Reversal technique
- Direct change

- Consider the (standard) solutions already considered & found wanting & reverse them

For example : We had decided on a long-run, low-priced, product for the mass market. Let's try short-run, high-priced, quality products for selected market segments.

Apply these questions to the product (service or procedure) under review :-

- What changes would you like to see ?
- What changes would others like to see ?
- What product features should stay ?
- What product features might be changed ?
- Remove the product from the market, what would replace it ?
- If we discarded the Mk1 version, what features would be retained in the Mk.2 version ?
- Why are we continuing with this product ? this size ? this colour range ? this packaging ? this marketing process ? etc.

USING COMPUTERS IN PROBLEM-SOLVING

Computers may permit :-

- Rapid data processing to facilitate decision-making.
- Useful to explore 'what-if's.
- Pinpointing of problem areas from a consideration of the data.

Computers are not decision-makers unless programmed by people to make decisions, by using human foresight to make routine decisions.

DECISION MAKING

A decision is 'made' when it is 'actioned' & the action 'followed up'

* TYPES OF DECISION

TYPES
- Selective
- Creative

Selective → Problem solutions exist & you need only choose between identifiable alternative courses of action.

Creative → - Problem solutions do not exist (or are not identified) & alternatives need to be created first

- Strategic – long term; dealing with goals & objectives; not routine or repetitive; complex; many variables.
- Operating – short term; possibly repetitive; fewer variables.
- Administrative – concerned with organisational problems; results from conflicting demands of str°. & op°. problems.

* A DECISION MAKING PROCESS

1. Identify Objectives → What are you trying to achieve?
   - What is your objective in making this decision?
2. Identify Constraints → - What you can/cannot do must be considered, taking account of the constraints of the situation.
   - 'must' constraints - have to be considered.
   - 'want' constraints - should be considered or they re-appear as 'snags'.
3. Creating Alternatives → Try brainstorming.
   - Use keyword triggers
4. Choose best Alternative → What action is:
   - realistic,
   - attainable,
   - practicable &
   - overcomes most constraints

INTERIM action - what would put the problem on 'HOLD' & allow breathing space?

ADAPTIVE action - how might you adapt to the new problem situation and make it NORMAL?

CORRECTIVE action - how might you eliminate the cause of the problem?

PREVENTATIVE action - how might you minimise the risk of recurrence of the problem?

CONTINGENCY action - what can you do in anticipation of a recurrence of the problem?

PEOPLE FACTORS IN DECISION-MAKING

* D-M AND PERSONALITIES
* D-M AND PERSONAL BIAS
* INFLUENCE OF PERSONAL FACTORS

DECISION-MAKING & PERSONALITIES

Decision-making usually involves/affects people at some stage, consider :-

- Are the right people involved in the d-m ?
- When negotiating, are you negotiating with the decision makers ?
  - If not, d-m is delayed for further consultations to take place.
- Can any person(s) undermine the decision ?
  - If 'YES', what should you do about them ?
- What will be the reaction of the people who will implement that decision ?
  - Resistance will diminish if proper communication is maintained & they are somehow involved or/& informed.
- What repercussions are likely ?
- What are the implications for the person making the decision ?

DECISION-MAKING & PERSONAL BIAS

Personal bias of a decision maker may produce :-

- Tunnel vision by the decision maker.
- A need to justify the decision, by..
- Manipulation of facts, leading to...
- Emphasis of the 'pros' & playing down of 'cons'.
- Halo effect

INFLUENCE OF PERSONAL FACTORS

- Halo effect on decisions
- Difficulty in changing decisions

When people believe it is their RIGHT to make decisions on particular matters .....
CHANGING DECISIONS is difficult because they feel :

- their authority is being undermined,
- its admitting to faults,
- its admitting they had not considered everything,
- they will lose 'face' in superior/subordinate dealings.

HALO EFFECT We tend to :

- Agree with the decisions of those we admire & like.
- Veto the decisions of those we dislike, or who seem to threaten us.

HIGH RISK v LOW RISK

High-risk decisions are sometimes abandoned for low-risk decisions due to :-

fear of failure,
fear-generated stress.

THERE IS A NEED TO TAKE THE ELEMENT OF FEAR OUT OF D-M

Group decision-making means shared responsibility for the outcome of the decision.

T.A.R.G.E.T. mnemonic for decision-making

Target - at what you aim to do.
Assessing - what do we need to hit the target ?
Receiving - alternative solutions.
Get it right - will this decision get max. benefit for minimum risk ?
Evidence - who needs to be convinced ? Is the accept/reject decision an easy one?
Task completed - implement the decision & monitor the outcome.

- Use 'what-ifs' to evaluate alternatives.
- Make risk/benefit analyses for each alternative.

Internal features
- Resources; time; expertise; manpower; etc.

External features
- Legislation; licenses; permits; etc.
- Market influences; etc.

« Issue 1

Do you need a decision NOW ? Given time might the problem go away, or at least diminish in magnitude ?

STRESS FROM 'DECISIONAL CONFLICT'

* SYMPTOMS
* EFFECT OF STRESS ON DECISION-MAKING

SYMPTOMS - are the usual stress symptoms :-
- Emotional anxiety; apprehension, etc.
- Physiological features & feelings
- Feelings of impending loss if wrong decision is made
- They may be suffered by individuals or groups.

- Changes in heart rate; blood pressure; sweating; etc.

LOSSES
- Material & social penalties,
- Reputation & self-esteem as a decision-maker.

DECISIONAL CONFLICT - the outcome of our interpretation & perception of problematic events leading upto making a decision & our fears over making a faulty decision.

EFFECTS ON D-MAKING
- Information handling is impaired, so planning suffers.
- Crisis management becomes the norm ⇒ irrational decisions.
- No decision is made (decision-paralysis) or less effective decisions are made.

* REDUCING DECISIONAL STRESS
* MINIMISING STRESS FROM D-M

REDUCING STRESS
A decision implies choice so :-
- Believe that better alternatives exist
- Evaluate the risks associated with the alternatives being considered
- Don't delay d-m until time constraints add another stress factor.
- Beware information overload making decisions more difficult.

- Clear understanding is necessary of the size of risks when choosing between alternatives.

- Evaluation of alternatives should not be shortened whatever the pressures.
- Don't seize upon decisions for short-term relief's sake.

MINIMISING STRESS
- Raise one's awareness of RISK
- Reduce defensive 'bolstering' (selling) of your chosen alternative.
- Recognise the stress & seek assistance in relaxation & other stress-reducing techniques
- Manage one's personal time more effectively so as not to be forced to acknowledge time pressures
- Use of decisional balance sheet

- A formal, written expression projecting for each alternative .....
  - the gains & losses (probable, material, tangible) for yourself & others.
  - the social or psychological (+)'s & (-)'s likely to be incurred (approval / disapproval).
- There is value in examining the potential negative consequences of decisions by asking 'what if's' & steel yourself against adverse consequences based on.....
  'If it can go wrong, it will!'

- Reduce 'emotional side effects' by psychological projection of an imaginary scenario of the outcome of choosing one or another alternatives.
  - Is the risk all yours or is it shared ?
  - Are you possibly exaggerating its importance ?

- Don't be pushed into instant decisions. In group problem-solving & decision-making activities, basic training in these skills speeds up the analysis & defining stages leaving more time to consider alternatives.

INTRODUCTION & INDUCTION TO JOBS

* WHO DOES IT ?
* WHY IS IT NECESSARY ?
* PROBLEMS IN THE RECRUITMENT OF SCHOOL-LEAVERS
* INDUCTION OF NEW EMPLOYEES
* ON-GOING REQUIREMENTS

WHO DOES IT ? A shared role:-
- Introduction is mainly a line manager's or supervisor's responsibility.
- Induction is mainly the personnel manager's responsibility

- If no personnel manager (eg. in a small company) it devolves upon the line manager.

NOTE :- Induction & training will not wholly compensate for bad selection. Better to specify a 'probationary period' & a mutual review of suitability for the job.

WHY IS IT NECESSARY ?
- Recruiting the right person is an expensive process. Early loss of new appointees represents a financial loss to the company.
- Safeguards the company in certain industrial disputes

- The higher the 'rank' of the appointee, the greater the delay & loss incurred.
- Financial loss due to recruitment costs & absence of a job holder.

PROBLEMS WITH SCHOOL-LEAVERS
- Culture shock moving between educational & work environments
- Selling the company/organisation to the school-leaver especially when the starting pay is low
- Intolerance with slow learners seems to underline 'perceived' deficiencies in modern educational standards

- longer working day/week.
- firmer controls & discipline.
- new 'adult' environment.
- added responsibility.
- shorter holidays.
- new attitude to learning.
- different learning needs.

- Why work a long week for little more than unemployment benefit (for no work)?
- What do they teach them now-a-days?

INDUCTION OF NEW EMPLOYEES

Installing, leading into work.
- Programme it
- Try to do it in company time in a training centre or separate room off-the-job.
- Establish a clear distinction between company & departmental matters.
- Introduction to the company, the system & the people
- Introduction to the work itself

- Lack of such courses may provoke criticism, irritation & conflict at a later stage. Industrial Tribunals may not uphold a dismissal for incompetence.

ON-GOING REQUIREMENTS

Looking to the future by
- Assessing training needs.
- Providing facilities for & carrying out training.

- Introducing the Company - begins at the selection interview.
  - Could take from 1 day → 1 week with larger companies.
  - Could be assisted by suitable literature &/or an audio-visual presentation → Ensures uniformity of presentation if it is frequently needed.
  - Best accompanied by some person(s) to 'humanise' it → Enhances the feeling of being welcomed; of belonging; of being cared for; & a person to refer to when difficulties arise.

Introducing the Department
- Possibly a supervisor's job providing it has been planned & the supervisor is adequately knowledgable & trained.
- An important first contact with day-to-day management.

- Introduction to work by managers or supervisors. (Properly trained)
- Explaining the job elements.
- Describing each element & reasons for doing it ..... encouraging questions.
- Supervision of each element with constructive criticism & further instruction as might be appropriate.
- Controlled increase of trainee's responsibility.
- Reporting back; monitoring performance; informal... 'how are you getting on ?' → Identifies mis-fits. Encourages useful ones. Identifies the over-qualified or the high fliers.
- Maintain trainee/supervisor/manager contacts.

USE OF COMPANY HANDBOOKS

Useful in organisations of any size. Not a glossy booklet but one which is easily & readily updated. Used to supplement the contract of employment by clarifying company policies; elaborating on facilities; elucidating procedures, etc

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EMPLOYING NEW GRADUATES

* WHAT ARE THEIR EXPECTATIONS ?
* THE QUESTIONS THEY ASK
* THE ORGANISATION'S DEMANDS

EXPECTATIONS
- Challenge, adventure & responsibility
- Opportunity to be creative & original. → - And use any special aptitudes & skills.
- A career structure & good salary.
- A chance to work with people & exercise leadership.
- A degree of autonomy.

QUESTIONS THEY ASK
- Will I be able to cope with a full-time job? → - After years of comparative academic & personal freedom
- Will I have a chance to show what I can do? → - How much will I be expected to adopt the company culture & conform?
- Will I learn & grow? → - I want to learn new things & develop new talents.
- What should I expect?
- What if I fail at first?

ORGANISATIONAL DEMANDS
- Loyalty & commitment.
- Competence in their chosen area.
- A quick grasp of the organisation's procedures.
- Learn from their mistakes & don't repeat them.
- Flexibility & adaptability.
- A new perception of the company's problems.

- Quickly learn to communicate.
- Relate to people especially non-graduates at lower levels within the organisation.

* VALUE OF INDUCTION COURSES
- Introⁿ to company policies & structure. Where the coʸ is going
- Locates the graduate within that structure.
- See the relevance & importance of their job/role in the organⁿ
- Introⁿ to company culture.
- Reassurance & encouragement to meet others in the same sitⁿ
- Commence training in subjects beyond the scope of normal academic training.

* OTHER USEFUL INITIATIVES
- Assign them to a regular department & not to a training group.
- Give them challenging, important jobs which involve REAL work
- Explain the company training philosophy & possibly fit them into the program
- Tolerate failures at first as long as the graduates learn from errors.

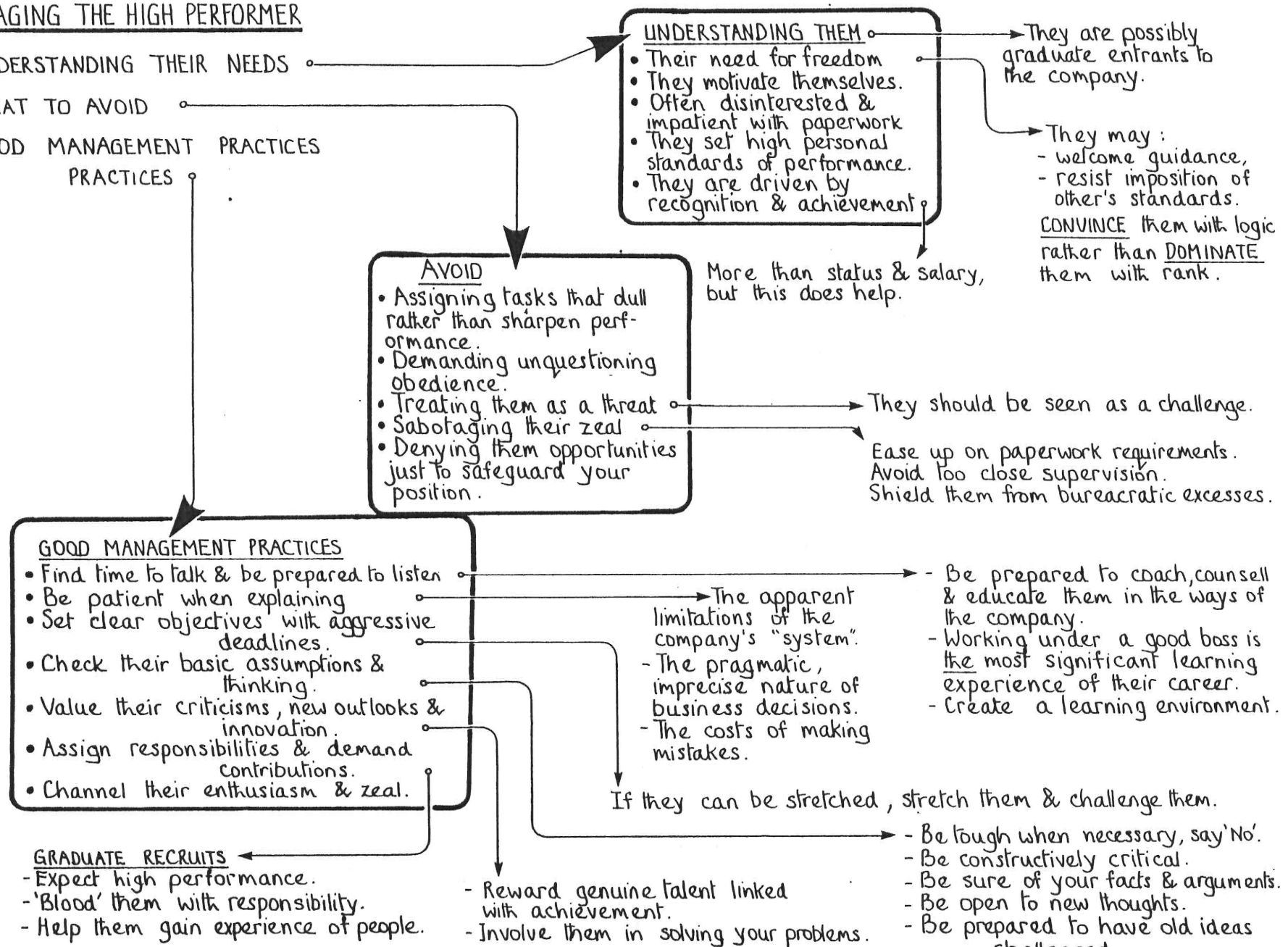
- Accent on REAL TIME work, not unimportant tasks.
- Maximise the responsibility given in these early assignments & don't over-protect the graduates
- Indicate possible sources of support & training. Try on-the-job training.
- Assign them to supervisors. It may be necessary to train them beforehand - must be technically secure.

Remember :- New graduates are post-adolescents still seeking their identity & desperately needing to test themselves. They want adult treatment but still have dependency needs stemming from their comparative immaturity.

* TRAINING THEIR SUPERVISORS
- Heighten their awareness of the graduates' potential problems?
- Helps them to build relationships & communicate better.
- Helps them identify other sources of help within the organisation.
- Removes stereotype perceptions of graduates, & must improve understanding.
- Re-inforces & revises company rules & procedures which are to be observed - avoids '... forget that... do it my way.'

MANAGING THE HIGH PERFORMER

* UNDERSTANDING THEIR NEEDS
* WHAT TO AVOID
* GOOD MANAGEMENT PRACTICES



THE VALUE OF PEOPLE

* WHY CONSIDER IT ?
* VALUE DEFINITIONS
* ROLE OF THE PERSONNEL MANAGER

WHY CONSIDER IT ?

- For organisations run for profit, Return on Investment in manpower is as important as R.o.I. on any other resource.

VALUE DEFINITIONS

- Basic value
- Replacement value
- Market value
- Transfer value
- Maintenance value

BASIC VALUE

- The potential cost upon the employer of this particular person on the payroll :-
  - Salary, pension & insurance contributions, etc.
  - Cost of working space & consumables.
  - Cost of support facilities (telephone) & staff (secretary)

Assumes value is synonymous with cost for want of an alternative method of measuring - rather crude.

ROLE OF THE PERSONNEL MANAGER Includes :-

- To ensure that the most effective use is made of human resources
- To ensure an adequate supply of the right people at the right time to do the jobs as defined ;

- Perhaps through recruitment, but also by monitoring staff capabilities & training when a need is identified.

- Considered as R.O.I.

MAINTENANCE VALUE

- Without training people's value depreciates & R.o.I. will fall.
- What is the cost of maintaining their skills & technical knowledge ?
- (What does the company pay on maintaining the manager's / company car?)

TRANSFER VALUE

- J.S. Hekinian & C.H. Jones (1967) maintain assets only have value if there are alternative uses for them. If sports-persons can be seen as investments, why not executive talent ? Firms could 'sell' employees with talent to organisations needing talent.

REPLACEMENT VALUE

- What would it cost to replace a particular person in their post ? This includes training upto present levels of effectiveness.

MARKET VALUE

On the job market :

- Employees sometimes apply for other positions to measure their worth in financial terms.
- Employers should consider the salary they would need to offer to pay a replacement.

Such concepts as the monitoring of labour costs place the personnel management function at the heart of a business & not the fringe. Means more accurate assessment of R.O.I. & better informed decision-making concerning expansion or diversification.

DISCIPLINE & MORALE

* OUTWARD SIGNS OF GOOD DISCIPLINE
* ELIMINATING DISCIPLINE PROBLEMS (ESTABLISHING AUTHORITY)
* ESTABLISHING MORALE
* ESTABLISHING RULES

OUTWARD SIGNS

- Appearance of premises & work environment
- Appearance of workforce
- Attitude of supervisors/managers
- The work flow
- Attitude of workforce

- Self disciplined – observing regulations & procedures.
- Few accidents.
- Punctual, limited absenteeism.
- Acknowledge authority of their supervisors.

- Good quality.
- Good quantity.
- Low waste levels.

- Clean, tidy, hazard-free.

- Appropriately dressed; appropriately behaved; observing safety codes; etc.

- Treat workforce with respect; uncritical of the company; observe & apply rules fairly.

DEFINITIONS

MORALE is a group phenomenon. With good morale the group is enthused with positive & successful spirit; relationships are cohesive & harmonious. Group members act in a way that strengthens well-being.

POSITIVE DISCIPLINE is where a group accepts control & direction at the expense of personal wishes or convenience for the team's sake. Individuals regulate themselves in the interest & well-being of the group or team.

ESTABLISHING RULES

A 'mode of procedure' governs day-to-day operations. Should be :-

- clearly stated,
- fair & reasonable,
- capable of revision if necessary,
- explained to those to whom it applies, &
- the consequences of infraction made clear.

Where deviation from standards occurs, appropriate disciplinary or corrective procedures need to be applied. *➤

ESTABLISHING AUTHORITY

Means having a socially acceptable, legalized power structure:-

- Managers & supervisors need clear terms of reference & powers which are acknowledged.
- Staff are knowledgeable; well informed
- Staff are trained in the procedures they will apply.
- Staff have appropriate personal qualities.

- Diplomatic,
- Well organised,
- Exemplary,
- Sense of fairness,
- Concern for their subordinates,
- Good listeners,
  etc.

- Can explain the thinking behind rules; procedures; etc.

ESTABLISHING MORALE

is assisted by a management which :-

- Cares for its employees.
- Has clear objectives which can be understood by all.
- Lets people know what is expected of them.
- Has rules which are fair & sensibly applied.
- Keeps people informed of developments.
- Has good supervisors & middle managers.
- Gives constructive feedback & criticism.
- Makes training, development & career opportunities available to all.
- Establishes & adheres to good lines of communications.

*➤ DISCIPLINARY PROCEDURES

The essential features are:

- they must be written & specify to whom they apply.
- they will specify who will take the disciplinary action.
- an indication of what disciplinary action will ensue.
- provide for individuals to be....
  - informed of complaints,
  - investigated,
  - represented, &
  - the procedures for appeal.
- provide a system of recording procedures for reference (& a procedure for erasing records.)

*➤ Disciplinary procedures provide for action in cases of dishonesty; stealing; breaking safety rules; lateness; insubordination; absenteeism; etc.

FOLLOWERSHIP (1)

* FIRST STUDY LEADERSHIP STYLES
* DEVELOPING FOLLOWER GROUPS
* FOLLOWERSHIP & THE NATURE OF ORGANISATIONS

LEADERSHIP INFLUENCERS

The style of leadership & its effectiveness depend upon :-

- The sort of followers you have,
- How well they work together,
- The maturity of the leader : follower relationship,
- The stage of development of the groups being led,
- The opportunities for the leader to lead.

Wherever you have leaders you must also have followers. The problems of follower-ship are more widespread since there are many more followers than leaders.

FOLLOWER GROUPS

- New groups with new tasks & new leaders → Possibly require more guidance & autocratic leadership. LEADER :- high task & low relationships
- Mature groups with familiar tasks & familiar leaders → Could possibly make their own decisions in absence of a leader. LEADER :- low task, low relationships, high delegation
- Mature groups with new leaders → Less likely to tolerate autocratic behaviour

THE NATURE OF ORGANISATIONS

Will influence the leadership styles, the nature of authority and the feelings of followers. By nature, they may be :-

- COERCIVE
- UTILITARIAN
- NORMATIVE

Followers show :-

- Involvement,
- Dedication,
- High motivation,
- Commitment.

- Follow willingly.
- Respond to charismatic; entrepreneurial; messianic; forms of leadership.
- Small power-distance (Leader-Follower).
- Authority is rational.

Followers show :-

- Caution,
- Suspicion,
- Lack of involvement,
- Self-protecting.

- Follow more willingly.
- Require supervising by bureaucratic; representative leaders.
- Medium power-distance.
- Authority of position.

Followers show

- Submission,
- Dependence,
- Resignation,
- Concern for own goals.

- Follow unwillingly.
- Require autocratic; traditional leadership by powerful persons.
- Large power-distance (Leader-Follower) exercising reward & punishment system.

All people are followers at some time depending upon :-

- The culture of the organisation & its environment
- Their position in the organisation's hierarchy
- The nature of the task
- Their basic psychological make-up

- We develop patterns of behaviour from childhood which may fit us to becoming (or avoiding) followers.

- Is there a tradition of following ? Consider servicemen in the Armed Forces or workers in industry (unions).

Followers are not born any more than leaders are born. Circumstances influence what we become & we often have the opportunity to change roles. Some actively seek the change.

CONSENT & CONTROL

* THE NATURE OF HUMAN WORKERS
* RECOGNISE CHANGING TRENDS
* 'ADVISE & CONSENT'

THE NATURE OF HUMAN WORKERS
In most situations they will :-
- Do what they are told & respond to instructions
- Humans like to work & conform
- Conformity implies a degree of consent

- Consent 'wears thin' when poor communications causes resentment.

- Thus self-discipline helps them to be 'comfortable', even in 'THEORY X' situations.

- Joining an organisation in an 'exchange relationship', individuals give up some personal rights & freedoms in return for sociable work & suitable remuneration.
- Discipline is part of our social conditioning.

RECOGNISE TRENDS
- People with higher levels of education seek higher level work.
- Such well educated managers will offer intelligent educated contributions.
- Orders are willingly obeyed if the recipient agrees with them
- Staff / experts are there to advise but cannot give orders to line personnel.
- The manner of exercising authority is changing.

- Orders are willingly obeyed if :-
  - Recipients helped formulate them, or
  - They are orders they would have given themselves.

'ADVISE & CONSENT'
- Is replacing 'order & obey'.
- Is a form of 'controlled freedom' for the subordinate
- M.b.O. properly applied gives subordinates the opportunity to consent to individual objectives
- Managers need the authority that comes with expertise

- However, being informal is no substitute & no excuse for not being firm & strong.

- M.b.O. is rarely, totally successful or properly applied.
- The rigidity of M.b.O. conflicts (possibly) with the element of consent.
- People may then be judged on performance against an agreed standard or target.

True authority carries with it obedience & consent.
Japanese Culture - Authority goes to the expert, respect to the senior person.
Western Culture - Authority & respect normally goes to the senior person.

Increasingly, now-a-days, respect for others has to be won, usually by producing professional results, & is not automatically given to a post-holder.

Need for authority & control.
- The organisation is greater than an individual & will probably outlast individuals.
- The need for organisational survival is a prime managerial objective.

◁ Issue 1

POWER

* POWER FROM INTERNAL ORGANISATIONAL CONFLICT
* REDUCING CONFLICT USING POWER
* INCREASING/ACCRUING PERSONAL POWER

POWER FROM CONFLICT

Power 'follows' from conflict within organisations where certain conditions prevail eg.

- High interdependence between subunits of an organisation
- Subunits having heterogeneous goals (competing)
- There is competition for scarce resources.

Ties the 'actors' together.

REDUCING CONFLICT

Conflict may be reduced or resolved through the exercise of power.....

- When it reduces the scarcity of resources & consequently the competition
- to select &/or recruit persons with similar backgrounds/ideas
- to reward or sanction persons according to their viewpoints &/or activities

- In organisations, reduce conflict for personnel & jobs by creating more jobs & titles.
- Reduces conflict if sufficient resources can be made available to satisfy the needs of competing subunits.

- Produces homogeneous organisations (but they may make poorer decisions)

PLOYS FOR INCREASING PERSONAL POWER

- Understand the decision making process & rules of the organ:
- Always be seen to be associated with winning, powerful persons or subunits
- Pay attention to one's appearance, verbal skills & articulateness.
- Manage boundary transactions
- Reduce opposition to one's activities

- Not only the formal prescribed processes but also informal procedures.

- Requires skill in diagnosing where power lies & to become aligned with it.
- Centralised organisations concentrate power & reduce competition.
- Decentralised organisations lead to political activity, bargaining & coalition forming.

- Reduce perceived importance of decisions you are making

- Cultivate contacts with a view to possible future value in colleagues, officials, suppliers, customers, etc.

POWER IN ORGANISATIONS

* WHAT IS POWER ?
* GROWTH OF POWER & AUTHORITY IN ORGANISATIONS
* POINTERS TO POWER IN ORGANISATIONS

WHAT IS POWER IN ORGANISATIONS ?

- Primarily - a structural phenomenon
- Power is relationship or context specific

- Usually associated with vertical hierarchical dimensions.
- Created by division of labour; task specialisation & departmentation.

- Differences of influence between
  - one person & another, or
  - one subunit & another subunit.
- Has implication of conflict &/or resistance between the parties

eg. Manager A wants action from Manager B ; some resistance is overcome ; Manager B complies with Manager A's requirements.

AS ORGANISATIONS GROW :-

- Norms & expectations develop.
- Patterns of influence develop.
- Social control by others develops
- Controls become legitimated & authority is assigned to post-holders.

AUTHORITY IS LEGITIMATED POWER

These controls are :
- Socially approved,
- Socially acceptable,
- Not resented,
- Expected & desired.

POINTERS TO POWER

- Assessed by symbols
- Assessed by reputation
- Assessed by representation
- Other pointers

(Sometimes pointers are difficult to discern since 'winners' don't boast & 'losers' don't complain)

Manifest in titles ; parking places ; furnishings ; secretaries & assistants ; office size & location ; etc.

Established by asking others to rank persons/subunits as they are perceived on the scale.

- Critical executive positions held.
- Representation on prestigious decision-making committees.
- Internal & external liaison groups.

Decisions must be perceived to be critical & important.

eg.
- strategic planning,
- policy making,
- recruitment,
- resource allocation,
- advisory & steering groups.

- Salary rates of individuals,
- Number of employees in the subunit,
- Position on the Board of Directors ; etc.,
- Visibility & publicity ; representing the organisation ;
- Always seen on the 'winning' side,
- The consequences of decision making in which one is involved.

ORIGINS OF POWER

* FORMALIZED POWER IN PEOPLE/SUBUNITS
* THROUGH HANDLING UNCERTAINTY
* POWER FROM CONCENSUS
* POWER FROM INFORMATION

Power derives from having something that someone else wants or needs & being in control of the performance or resources where few alternatives are available or desired.

FORMALIZED POWER IN PEOPLE & SUBUNITS

- Gained by virtue of their role within an organisation & the perceived importance of the role.
- Through their skill in the performing of that role .... &,
- The dependence of others on their activities

→ Especially if their abilities are substantial & important, eg. key workers in a production line; electricity power engineers; safety men in a mine; etc.

HANDLING UNCERTAINTY

- Where persons or subunits can alleviate uncertainty- power is derived, e.g. having a monopoly of skills in key tasks; having sole expertise; ability to release funds; etc

- Where they may have discretion in the allocation of resources
- They may control discretionary resources (10% rule).

→ eg. money; personnel; raw materials; expertise; knowledge; customers; ability to cope with uncertainty, etc.

→ 10% RULE - many organ^ns can be manipulated by discretionary control of sometimes less than 10% of the organisation's total budget.

FROM CONCENSUS WITHIN SUB-UNITS of an ORGANISATION

Through :-

- Internal harmony within subunits.
- Easily understood position & perspective.
- Well articulated presentation of cases/arguments.
- Favourable comparison with the state & condition of competing subunits.

→ In electoral politics, a critical dimension of success is 'visible' consensus which is apparent to the electorate.

BEING IRREPLACEABLE

- By with-holding information & knowledge.
- By shutting off other sources of competence, information or knowledge.
- By preventing the use of alternatives.

POWER FROM INFORMATION

- To have knowledge & information is power
- To control communication networks → Formal & informal
- To be located where the decision making goes on → eg. shortlisting candidates for important appointments.

→ of decisions being made.
- of strategic plans.
- of desired outcomes.
- of location & availability of resources.
- of potential changes.

POLITICAL LANGUAGE - IN ORGANISATIONS (P.L.)

* WHAT IS ITS PURPOSE ?
* TASK OF POLITICAL LANGUAGE
* VALUE OF POLITICAL LANGUAGE ON NEW EMPLOYEES

PURPOSE OF P.L. ? It affects :-
- Feelings ; attitudes ; beliefs ; perceptions & values - strongly
- The substantive outcomes of power - to a lesser degree.

The effectiveness of leaders lies in their ability to make activity meaningful for those in their role set & so help them to understand what they are doing. The capacity to use language to make sense of things is a valuable asset.

TASK OF P.L. Used to :-
- Rationalise & justify decisions resulting from power & influence plays ....&
- Make them acceptable & legitimate in the organisation
- Make the use of power unobtrusive.
- Make a political decision process appear to conform to widely shared social values.
- Simplify a complex reality
- Avoid assessment & conceal info"
- Re-assure others & convey a sense of efficacy ; control ; etc. (the surrogate for the substance).

- The exercise of hierarchical influence & power involves a large component of P.L. & 'symbolic activity.'
- They are important to the social actors concerned in the processes of the organisation.

- To employ social processes like this is widely accepted to reach social consensus.
- Failure to develop a shared language leaves the leader &/or subordinates vulnerable.
- It provides re-assurance to concerned persons.
- It alters the perceptions of the various 'actors' & the decisions they make.

- Thereby quieting opposition or mobilising support.

- The non-release of information can forestall opposition ; create support for organisational policies & values ; & prevent social comparisons.
- People tend to judge another person by their goals .... & not necessarily by what they accomplish nor by how well they succeed.

eg. 'changed circumstances ?'
- Ignore the causes of change, talk only of the new situation ; new opportunities ; likelihood of success ; etc.

To shape uncertain, undefined, or unstable preferences in advance of decision-making → especially for those who will be influenced by the decision

The perception must be consonant with prevailing social values or with the goals of those from whom support is sought.

P.L. ON NEW EMPLOYEES
- Novelty & unfamiliarity is increased by the use of specialised language, codes & abbreviations. Add this to.....
- Uniforms ; customary modes of dress ; badges · etc. make organisations special & different, ... and
- Symbolic actions like initiation rites, & ceremonies transmit social influences

- Collectively they shape a person's perceptions of the organisation they have joined & increase their susceptibility to indoctrination.

* COMMENTS ON THE USE OF P.L.
- 'Talk .... involves a competitive interchange of symbols, referential & evocative, through which values are shared & assigned & co-existence attained.' EDELMAN 1964
- 'Sharing a language with others provides a subtle yet powerful tool to control their behaviour to one's advantage.' MORRIS 1949
- 'Language is, after all, one of the key tools of social influence.' PONDY 1978

SYMBOLIC ACTION - IN ORGANISATIONS

(THE CREATION OF MEANING)

* SYMBOLIC ACTION

May be found in :-
- Language
- Ceremony
- Use of symbols
- Settings

all of which create shared beliefs & confirm the social structure of organisations.

LANGUAGE is used to
- develop a shared set of meanings within the organisation
- to re-assure individuals (or groups) & provoke positive sentiments → followed by commitment
- to alter perspectives

- Leads to shared culture & philosophy.
- Implies organisational success only when these are shared.

- eg. questionnaires concerning 'change' may refocus attention of individual (or group) into believing something has actually, or is about to be, changed.

- Perceptions alter as a person may be described as a boss; supervisor; elder; consellor; etc. OR competitor; co-worker; peer; etc.
- In other contexts, to establish norms; rules or laws.

SETTINGS may include :-
- size,
- location,
- physical design of space,

where the other 3 symbolic actions take place

- May govern what degree of social interaction is possible, eg. team meetings, disciplinary incidences.
- Visual reminders of power & influence eg. size of office & furnishings.
- Can be important in the arrangement of personnel at meetings.

CEREMONY/CEREMONIES
- Succession - re-assures hopes of progression in the company.
- Scapegoating - satisfies demands for change & retribution
- Selecting replacement, with ceremony, reaffirms importance of the position
- Meetings - a symbolic reassurance of an important interest
- Initiation; long service; retirement - show the value of commitment to the organisation.

- Person to be replaced is made more visible as a symbol of past problems; ritually discredited & publically dismissed.
- Act of replacement mobilises support & quietens opposition.
- Those who remain are re-motivated.

USE OF SYMBOLS is an attention focussing process.
- A restructuring of organisational design may re-assure workers, clients, owners or some other group who are presently unhappy
- New appointments or titles suggest fresh emphasis, interest & proof of change .....

Both motivate & placate sectional interests in contact with the organisation.

- eg. Annual meetings of shareholders & their organisation.
- symbolism can be enhanced by the selection of the venue.
- generate social support through 'Joint Consultative Committees' (Symbolic reassurance of shared power.)

eg. 'Consumer Affairs Section' (not a complaints department) gives the impression of an administrative structure to deal with a problem. Cools off & placates opponents / dis-satisfied customers.

MAPPING YOUR MOTIVATIONAL PATTERNS (M.P.s)

* WHAT ARE THEY ?
* WHERE DO THEY ORIGINATE ?
* HOW ARE THEY MAPPED ?

MOTIVATION PATTERNS of behaviour
- A God-given unique gift to every human..... which
- Lasts through childhood & extends through adulthood.
- A 'dynamic' which affects your whole outlook → It can be nurtured, it will mature but it cannot be altered significantly.
- An irresistable pattern in your behaviour → - Will be achieved even in repressive environments. - Usually triggered by a particular circumstance.
- It is insatiable → - One is never satisfied no matter how many satisfactory achievements are experienced.

THEY ORIGINATE in the will.
- Everything we do is decided by the will.
- The will manifests itself.....
  - by our intentions, &
  - by the way we do things.

THEY ARE MAPPED
- Through an autobiographical review of our particularly satisfying achievements
- A transcript of the review is studied event by event
- The patterning rules are observed

- Everyone will show some consistent pattern of voluntary behaviour from childhood.
- By training we may enhance but not change our basic selves & fundamental M.P.'s
- Our M.P. lies behind our talents & not within them.

PATTERNING RULES
- Add up the words used, don't analyse their meaning.
- Don't extrapolate beyond the facts transcribed.
- Don't play the psychologist, this is a factual & not a psychological exercise.
- Don't condemn or judge when mapping another's pattern.
- Look for lifelong demonstrations before recognising patterns.
- Seek the trigger mechanism which stimulates the response behaviour.

Using a S.I.M.A. biographical booklet (*)
- Examine & list one's positive achievements in life
  - not necessarily successes.
  - some may be visible only to oneself.
  - no one will argue with, or contradict you.
  - don't be modest.
  - don't reject trivia if you think them achievements & got satisfaction.
  - include Childhood, School, work & social experiences in your recollections.
- Recall how you gained satisfaction from them
- Identify what satisfied you so much.

The tape-recorded interview
- Talk through & expand the listed achievements in greater detail.

Transcribe
- Link the writings & recordings for your own (or interviewer's) scrutiny to identify patterns of behaviour.

INGREDIENTS OF EACH EVENT Can you identify :-
- One motivational thrust eg. difficulty overcome; money earned; etc.
- Operating with people - the words you used eg. "I did ..." or "We did .." etc.
- What abilities were used? eg. create/shape; operate/run, etc.
- What is the recurring subject matter? eg. money; people; things; etc.
- What are the recurring circumstances? eg. disorder; competition; need; innovation; etc.

(*) S.I.M.A. = System for Identifying Motivated Abilities

USES FOR MOTIVATIONAL (S.I.M.A.) PATTERNS

* SPECIFIC APPLICATIONS
  - Basic level
  - Advanced level

S.I.M.A. patterns may be used to advantage in :-
- Schools & colleges
- Family life
- Social life
- Training
- The world of work

- Help teenagers make decisions about college & vocations.
- Assists teachers to help/advise them.
- Help school authorities to appoint staff.
- Reveal to teachers how youngsters best learn.

- Help married couples build satisfying relationships.
- Help parents understand their children.
- Help marrieds adapt to aspects of domesticity

- Adjusting the type of work to people's M.P.'s ⇒ improving performance & job enrichment.
- Managing personality conflicts.
- Identifying the job/career for you.
- Hiring & promotion
  - fitting right persons to jobs,
  - time & money saved,
  - staff turnover reduced,
  - trial & error reduced.

S.I.M.A. gives a high degree of match when used in these circumstances.

- Help some unemployed persons locate & land jobs they can realistically fill.
- Help people out of society back in touch.
- Identify retirement activities for yourself.
- Gain direction in life with the conviction we are unique and worthwhile.

- Direct training activities parallel with & not counter to M.P.'s.
- Identify learning styles & motivation of trainees.
- They suggest that training in skills contrary to one's M.P. would be unproductive

- Re-allocate tasks in a department.
- Train managers to manage → Motivate each individual differently.
- Hi-flier assessment & realistic career path planning.
- Train managers in selection interviewing.
- Selection of senior management → Removes the need for cumbersome tests.
- Analyse reasons for corporate performance → Analyse the top-team S.I.M.A. patterns.
- Provide managers with real advantages

They will gain a deep understanding of themselves - what they will do (or ignore) - allowing personal work restructuring in the manner of chief executives

For further details of S.I.M.A. patterns contact :-
- Brian Cawthray - Marshfield Publications Ltd (0225) 891-457

or
- Peter Daws - Consultant - 15, Afghan Rd., London, SW11 2QD
  (h) 01-228-6734 or (w) 01-821-6222 x 37

INTRODUCING M.b.O. TO ORGANISATIONS

* ACTIONS BY SENIOR MANAGEMENT
* EXAMINING KEY RESULT AREAS (K.R.A.'s)
* COMMUNICATING DOWNWARDS
* GROUND RULES FOR SETTING INDIVIDUAL OBJECTIVES

ACTIONS BY SENIOR MGT.

- List the expectations of shareholders; directors; management; workforce; customers; suppliers.
- Institute a thorough S.W.O.T. analysis of the organisation
- Identify KEY RESULT AREAS
- Prepare a Strategic Plan with long- & short-term goals.

S.W.O.T. analysis

Strengths & Weaknesses of the organisation.
Opportunities & Threats in the external environment.

KEY RESULT AREAS are :

- areas where success is essential for long term viability of the organisation.
- areas where improvements must be made.
- areas where effort will bring the greatest benefit.

EXAMINING K.R.A.'s

For each K.R.A., senior management staff should draw up :-

- Criteria for success,
- Standards to be reached,
- Lists of data they would require to monitor performance,
- Procedures for reviewing achievements,
- Create alternative methods of achieving these goals,
- A selected 'best option' to be adopted as part of the Strategic Plan.

K.R.A.'s will be :-

- Finance,
- Marketing,
- Production,
- Personnel,
- Research & Dev't.

etc.

GROUND RULES

- Not too many at once (<8).
- They should be set by the person who will do the task (assisted by the boss ?).
- Hard enough to stretch oneself.
- Not too hard to discourage oneself.
- Reviewable, not too rigid.
- Avoid vagueness / ambiguity.

VAGUE OBJECTIVES

- Mean a wide range of actions may be possible.
- Difficult to prioritise.
- Conflicting goals cannot be identified.
- Imprecise standards to measure performance are unhelpful.

COMMUNICATING DOWNWARDS

- The Strategic Plan is communicated to the next lower levels in org'n → Heads of departments & middlemanagers.
- They examine criteria in their own K.R.A.'s & work out their unit/dept'l plans..... followed by → Plans will consist of :
  - objectives for the period under review,
  - actions to be taken to achieve these objectives,
  - the performance criteria,
  - information needed to measure this performance.
- Briefing of immediate subordinates.
  - Manager explains the unit's goals,
  - Provides written examples of targets set for him/herself,
  - Asks subordinates to suggest targets they might set for themselves,
  - Subordinates produce written 'programmes',
  - Subordinates & manager review plans → Identifying :- · Clearer objectives, · Training needs (if any).
  - Manager coordinates all plans → To identify :- · Missing targets, · Consistency of targets.

(cont'd)

- Manager holds periodic reviews
  - to discuss individual & group performance.
  - to revise indiv. & group targets.
  - to encourage self evaluative attitudes in subordinates.

THE ESSENTIALS OF M.b.O. (MANAGEMENT by OBJECTIVES)

* WHAT IS M.b.O ?
* INTRODUCING M.b.O. TO AN ORGANISATION
* WHAT ARE OBJECTIVES ?
* ECLECTIC NATURE OF M.b.O.
* ADVANTAGES OF M.b.O.

WHAT IS M.b.O. ?
- A management philosophy
- A specific technique.

MANAGEMENT PHILOSOPHY
- A total approach to the management of an organisation involving senior managers & subordinates in setting & agreeing objectives.
- A belief that subordinates work best when they get GOALS, not CONTROLS.
- An integrative process involving people & tasks, not a mere goal-setting exercise.
- Involves understanding individuals & using group processes.

INTRODUCING M.b.O. Factors to be considered are :-
- It cannot be rushed - it could take 4-5 years to become fully operative.
- Difficult to develop if the necessary 'climate' is not already present → -Trusting ; supportive ; open ; non-punitive.
- Needs full, VISIBLE, continuous backing from senior mgt.
- May require changes in leadership style → **LEADERSHIP STYLE**
  - Current style in the organisation will be influenced by the company culture, tradition, experience & size of organ'n.
  - Necessary style would be 'participative' - managers generate contacts with subordinates but do not dominate them.

ADVANTAGES OF M.b.O.
- Improved self-direction by staff
- Improved communications.
- Improved coordination & cooperation
- Improved standards for control decisions
- Increased motivation at several levels.
- Greater unity of purpose within the organisation

- Organisation states its objectives precisely & communicates them to those persons who will implement them.
- Through agreed criteria for measuring performance.
- Objectives define clearly where responsibility & accountability lie.
- Everyone works towards aims & objectives they understand & accept.

OBJECTIVES ARE :-
- Basic motivators which keep the organisation moving forward
- Objectives are essentially goals but they are expanded
- Objectives need to be realistic; challenging; attainable; relevant & important.

Not to be confused with 'strategies'.

Not to be confused with 'goals' or 'targets' which are quantified statements of the levels of operating achievement (related to time) whereby the organisation measures its effectiveness in carrying out its strategies.

Objectives should :-
- specify action to be taken,
- focus on identifiable target results,
- be measurable, tangible or verifiable,
- specify deadlines & cost constraints,
- be cognisant of internal & external constraints.

ECLECTIC NATURE OF M.b.O.
- Goal statements & objective criteria will influence many processes within the company including :-
  - problem solving,
  - establishing priorities,
  - planning,
  - individual motivation,
  - participative decision-making,
  - translating aims into action,
  - capitalising on individual's expertise,
  - etc.

THE PREPARATION OF INTERNATIONAL MANAGERS

* PROBLEMS OF AN INTERNATIONAL MANAGER
* SKILLS TO BE DEVELOPED

PROBLEMS - Individual & Family

- How will they react to the 'culture shock' of being away from a familiar social environment ?
- How to adapt to the local national's way of negotiating ; doing business ; responding to an expatriate manager.
- The dangers of stereotyping

- Public cultural stereotyping, 'They're all like that!'
- Suffer acute stress & are unable to adapt to the surroundings
- Temporarily withdraw from local society.
- Plan an early return home.

- Deriving a private, cultural stereotype of local nationals then applying that image to all the nationals.
- It may give the individual a feeling of re-assurance but it may be a costly error.

- low local involvement,
- seek out company of other compatriots,
- seek English language newspapers & listen to the B.B.C.

- They sometimes suffer acute personal confusion too.

SKILLS TO DEVELOP

Make sense of the new environment by one's :-

- Readiness to experiment & take risks
- Willingness to observe & listen carefully
- Maintenance of an intuitive, empirical, rational attitude to involvement with local nationals.
- Tailoring yourself to your audience
- Regarding culture shock as a positive learning experience & adapting.
- Maintaining social engagements

- Keep them small scale rather than large leaps.

- What is going on ? Seek interpretations & meanings.
- Assume that things are probably NOT what they seem.
- Ask what is happening but delay judgement ; reaching rapid conclusions & relating observations to 'cultural stereotypes.'
- Feelings & impressions from previous interactions are relevant - as much as facts.

- Don't just withdraw, intellectualise or judge the local nationals.
- Try to establish a personal rapport which aids social adjustment in unfamiliar environments.
- Seek 'bridges' to help in cross-cultural situations.

- Don't accept the macro-stereotype of the local nationals.
- Attempt to differentiate cultures without comparing them (eg. all Middle-East nationals are not the same.)

MANAGING ACROSS CULTURES (INTERNATIONALLY)

* TYPES OF PROBLEM ENCOUNTERED
* AREAS OF CONCERN
* UNDERSTANDING CULTURAL DIFFERENCES

Any company preparing to deal across cultures should review its ethnocentric attitudes if it is to make progress.

TYPES OF PROBLEM

- Local antagonism to expatriate manager.
- High failure rate in attempts to train local nationals.
- Cultural differences → In social areas like food, music, dance, etc.
- Superior/subordinate relationships & the exercise of authority
- Differing perceptions on time management.
- Decision-making processes & international negotiating techniques.
- Western theories of power, motivation, leadership, etc. may no longer be appropriate.
- Language problems - barriers of semantics.

AREAS OF CONCERN

- Reaction to the 'culture shock' by expatriates (& families).
- Leadership styles
- Communication structures.
- Motivational factors

e.g. - friendly informality to subordinates who respond with increased formality.
- employees appear uncooperative.
- unwilling to take initiatives.
- seem unmotivated to work.
- etc.

- Unlike Western societies, inter-group competitiveness de-motivates some peoples, e.g. some Africans.

- Informality with subordinates may be in-appropriate & disquietening to employees. Interactions may need to be to be kept formal.
- Delegation of authority & responsibility is unsettling to those without power who feel incapable of managing it.

UNDERSTANDING CULTURAL DIFFERENCES Need to understand:-

- Power distances vary between cultures, also perceptions of power distribution in organisations
- Measures taken to avoid uncertainty vary between cultures
- Individualism v. Collectivism
- Masculinity v. Femininity

- Some cultures (e.g. Latins) see the managerial role in terms of political influence & power relationships.

- Some cultures do not see organisational conflict as threatening & have procedures to handle it.
- Others believe conflict in organisations should be eliminated.
- Avoiding uncertainty is countered by working hard - an inner urge to release stress (Austrians) & showing a strong obligation to society (low individualism.)

<u>Masculine traits</u> - pursuit of power, money, status, acquisitions, etc.
<u>Feminine traits</u> - quality of life & caring for others.
- What perceptions have the local nationals of these traits in expatriate managers?
- How would they react to....
  - a female manager?
  - a young manager supervising older workers?

- Western perceptions of caring for self & immediate family differ from those who have :-
  - extended families (S.E.Asia), or
  - who expect the organisation to care for them in return for loyalty.

CROSS-CULTURAL ORGANISATIONAL DIFFERENCES

* FEATURES OF CULTURES
* 4 DIMENSIONAL SPECTRA OF NATIONAL CULTURES

FEATURES Definition :-
- They are difficult to change. Any change is usually very slow (years) & is resisted.
- Cultures may be identified in diverse groupings eg. family; organisations ; nations ; etc.

CULTURE is a collective mental programming of the people of/in a particular environment - encompassing a number of people conditioned by the same education & life experiences.
GEERT HOFSTEDE 1980

- **MASCULINITY v. FEMININITY**
  - Identified in the dominant values of the society

Masculinity, concerned with:
- Assertiveness,
- Acquisition of wealth & things,
- Live to work,
- Clear sex roles, leading to male dominance.

Femininity, concerned with:
- Quality of life,
- Working to live,
- Fluid sex roles, leading to equality.

- **UNCERTAINTY AVOIDANCE** (U.A.)
  - Low U.A. suggests a culture of risk takers; a concern with performance & doing something to satisfy needs as suggested by Maslow

- Having a powerful superior whom one can blame (& praise) satisfies the need to avoid uncertainty.
- Cultures with strong U.A. trends don't take risks & don't conform to Maslow's perception of a hierarchy of human needs (Western).
  - U.S.A./U.K. e.g. place Esteem > Social Needs > Security
  - Other value systems Security > Social Needs > Esteem & Achievement (belonging)

- **POWER DISTANCE** (P.D.) dimension relates to people as subordinates & their attitude to superiors. Large P.D.'s mean superiors are held in awe as inaccessible (probably autocratic) persons/leaders

- Leadership complements subordinateship / followership. (- Initiatives taken by subordinates.)
- Small P.D.'s relate to more participative leadership styles.
- What is feasible depends on the cultural conditioning of subordinates.
- Western leadership theories advocate participation in decision-making by subordinates.
- Medium P.D.'s (USA/UK) ... initiatives taken by the manager.
- Large P.D.'s ··· initiatives taken by THE leader.

- **COLLECTIVIST ENVIRONMENT** Local employees need ties with the organisation for mutual loyalty & emotional dependence. Emphasises 'belonging' (Prefers non-capitalist order)

- Capitalism more associated with 'Individualist' cultures e.g. US & UK
- Individualism is characterised by a society where people care for themselves & immediate family. Any involvement with the organisation is calculative, we seek autonomy & financial security.

* IMPLICATIONS FOR TRAINING MANAGERS (INT'L)

If destined to work abroad, they need a thorough familiarisation with the new culture using :-
- Specialised cross-cultural training institutes, or
- Host country personnel to advise them.

* COMPANY POLICY IMPLICATIONS

- If differences in environmental cultures are obvious, Western management theories are constrained.
- If culture matters policies are less effective in different cultural environments
- Identical personnel policies may have differing effects in different countries.
- Also perceptions of absenteeism; financial incentives ; performance; quality; costs ; grievance procedures ; labour turn-over ; etc.

EVALUATION of ATTITUDES from SURVEYS

* DIFFICULTY OF EVALUATING ATTITUDES
* COLLECTING INFORMATION ON ATTITUDES
* EXAMINING 'ATTITUDE OBJECTIVES'
* VALIDITY OF THE SURVEY INSTRUMENT

DIFFICULTIES
- Attitudes are abstract constructs.
- They may only be inferred from words used or actions observed.
- Attitudes have many facets

→ Some attitudes may be altered by feelings; beliefs; peer group pressure; opinion leaders; fashions; trends; etc.

COLLECTING INFORMATION
- Surveys & Polls
- Self reporting
- Reporting on others
- Sociometric surveys
- From records

SURVEYS & POLLS
- Word of mouth instruments
- By checklists
- By questionnaire
- By observation procedures

- Use telephone
- By face-to-face
- By head counts

CARE NEEDED
- Not to lead the questionee.
- To be without bias.
- To avoid interviewer bias.

N.B. If attitude is a major objective of the survey, a wide variety of recipients is necessary.

FROM RECORDS
- OK, if the records are complete, up-to-date & contain info. relevant to attitudes in question.

SOCIOMETRIC SURVEYS
- OK, where groups report on other groups but only valid when questioning group patterns.

SELF REPORTING
- OK, if questionees know what the information is for/about.
- OK, if questions and unambiguous.
- OK, if no hint of stress which may lead to dishonest answers.

REPORTING ON OTHERS
- OK, if others cannot do it for themselves.
- OK, if interviewer is unbiased & objective.
- OK, if sample is representative.

'ATTITUDE OBJECTIVES'
- How important are they to the survey?
- How well defined are they?
- How will they be achieved?
- Are ethnic or legal principles involved?

- Are they capable of accidental misunderstanding?
- Are they racist; discriminatory; etc.

- Are the objectives clear & detailed?
- Are they prioritised?
- At what stage in the survey are attitudes tested?

- This governs the quality & variety of information gathered.
- Greater importance is put onto a greater variety of respondents.

VALIDITY OF SURVEY INSTRUMENT
- Is it appropriate for the survey?
- Are the results consistent?

N.B. A valid instrument is generally reliable. A reliable instrument is not necessarily valid.

FIXING THE PRICE

* STARTING FACTS
* PRICING OBJECTIVES
* PRICING STRATEGIES
* WHAT FACTORS AFFECT PRICE

STARTING FACTS

- Price is not the only factor in determining how a product sells.
- Price has an interactive effect on the aspects of the marketing mix.

PRICING OBJECTIVES

- Will have an effect upon profitability & revenue.
- Will affect the quantity of product sold by influencing demand. (Market share)

PRICING STRATEGIES

- Penetration Policy
- Skimming Policy

DISCOUNTING

- Quantity discount - for large purchases.
- Trade discounts - for middlemen &/or distributors.
- Promotional discount - to distributors to them to join promotional schemes.
- Cash discounts - for prompt payments.

SKIMMING POLICY

Means skimming the market with high initial price. Fine:-

- in a segmented market if it produces a segment willing to pay the price.
- if customers are unaware of the costs of producing & marketing.

PENETRATION POLICY

You may achieve market penetration by cutting prices. This is fine if:-

- sales volume increases enough,
- competitors are slow to move against you,
- market segmentation is less evident. It has
- long term pay-off due to cost reduction on increased volume of production & sales.

FACTORS AFFECTING PRICE

- Marketing objectives vis-a-vis corporate objectives → What does the company want from this particular product?
- Competitors (or potential competitors) → • Blend the product features & benefits to avoid direct comparison with others of different price.
- Costs of production & promotion → 'cost plus' is commonest consideration (but others exist.)
- Consumer attitudes & perceptions
  - • If value is perceived, high prices are expected. Low prices depress sales by reducing product credibility.
  - • Up-market / down-market perceptions govern price expectations.
- Potential markets; key markets; marketing differentials.
- Distribution channels → • How many middlemen? What margins & trade offs?
- Product life cycle → • Where is the product in its cycle? Keep pricing policy flexible & comensurate with life cycle position.

COLOUR & THE ROLE OF MARKET RESEARCH

* FIRST MAJOR PROBLEM
* NEXT PROBLEM
* NOW A SUBTLE ANALYSIS

FIRST PROBLEM Differentiating between likes / dislikes and buying – people may LIKE one coloured article but BUY another colour due to extraneous influences.

NEXT PROBLEM ?
Discover :-
- What has sold well ?
- What is the trend ?

Forecast :-
- What is next year's colour ?
- What are the indicators ?

→ **INDICATORS** may be found in sales of paint, fabrics & fashion goods. Also study women's magazines.

IMPORTANT COLOUR CHARACTERISTICS FOR PRODUCT
- Where will it be used ?
  - indoors / outdoors ?
  - in which room ?
- To whom will it sell – which market segment ?
- Does it need more than one colour ?
  - two tones ?
  - how many choices ?
- Does the product 'lead' colour trends or 'trail' them ?

- Colour trends change slowly in roughly 10-year cycles.
- Consistent colour combinations promote brand awareness.

COLOUR CHARACTERISTICS & THE MARKET ANALYSIS
- 'Up-market' (top 10%) may prefer sophisticated, different colours.
- 'Mass markets' – use brighter, simpler colours.
- Is the product likely to be :
  - an 'impulse' purchase ? (Use bold colours.)
  - a 'considered' decision ? (Use more subtle colours.)
- What will be the environmental effect on the product ?
- What are your competitors doing ?
- Would a change of colour alter demand ?
- Are you promoting or selling your product ?

Seaside towns – brighter colours in the cleaner air.
Industrial areas – dirt & grime may hide/alter colours.

CUSTOMER CHARACTERISTICS & COLOUR
- Colour preferences alter with the age & maturity of the customer.
- Motivation to buy varies from ....
  - practical needs, (functional colour)
  - emotional needs. (What mood colour?)
- What market segment are you selling to ?
  - young or old ?
  - single or married ?
  - male or female ? etc.
- Who makes the buying decision ?
  - wife for husband ?
  - individual decisions ?
- Are they buying for long ?
  - lifetime use ?
  - shorter term use ?
- People have expectations → eg. butter must be yellow, etc.
- Looking for a colour theme in each room ?
- First purchase or repeat purchase ?
  - First .... emphasis on price & utility.
  - Reseat ... emphasis on appearance.

GETTING RESULTS FROM ADVERTISING COPY

* PLACING THE ADVERT
* HOW EFFECTIVE IS THE ADVERTISING ?
* THE VALUE OF DOUBT
* IMPONDERABLES

PLACING THE ADVERT

- WHERE to place it
- WHEN to place it
- HOW big / HOW long

WHERE TO PLACE IT

Journals / magazines have various rates for different positions → Enquire of publishers or agency.

- PRIME - inside covers or back cover outside.
- R.H. Pages better than L.H. Pages
- Better nearer front of magazines → Mag's or journals with story carry over spreads interest further through the publication.

WHEN TO PLACE IT

(Assuming no seasonal appeal)

- Some months better than others for magazines → Advertising agencies will advise you.
- Some weekends better than weekdays in newspapers → Newspaper staff will advise.
- Choose the best times → Rates do not vary daily or monthly so some periods are better value for money.

HOW BIG / HOW LONG

- Bigger not always more effective.
- What can you afford? → Colour increases attention but increases costs sharply too.
- What does the product merit ?
- What are your objectives?

→ Advertising should produce a bonus, translating into sales.
→ Repetitive advertising with no bonuses becomes wasteful.

HOW EFFECTIVE ?

Important to keep records

- Which publications get best results ?
- What were good positions ?
- What were main features of successful adverts ?
- What copy to repeat / reject.

Knowledge of results increases learning.

SEEKING RESULTFUL COPY

Doubt makes you strive to improve.

- Will this really make someone switch brands ?
- Is my copy more persuasive than my competitors ?
- Am I producing value for money ?
- Am I placing the copy effectively?
- If its working - why change it ?

The enemy of good copy writing is complacency.

→ - Your potential customers are lazy readers. → Get people into your copy. Don't fear an appeal to 'dream'.
- You may advertise widely but you're only talking to one person at a time.
- Let the customers persuade themselves. → Remember nostalgia can pay by invoking positive or negative memories.

IMPONDERABLES

- Weather not insignificant → Poor weather – more readers. Good weather - fewer readers.
- Other news / articles → Bad newsbreak in newspapers depresses readership of magazines.
- Difference between male & female readers.

∝ ISSUE 1

WAYS OF IDENTIFYING LEARNING NEEDS

* IS M.b.O. THE WAY ?
* IS BOSS-SUBORDINATE APPRAISAL THE WAY ?
* SELF ANALYSIS & SELF APPRAISAL

MANAGEMENT BY OBJECTIVES
- Only a small percentage of companies who examine M.b.O. adopt it fully.
- Few managers can employ (or want) a highly disciplined rational approach
- Is the pain of implementation justified by significant improvement?
- Maintaining impetus beyond the initial M.b.O. implementation is difficult.

IDENTIFYING LEARNING NEEDS is not necessarily a sign of weakness or criticism of current performance. It requires an honest review of performance against defined standards. Don't separate learning from other managerial duties

BOSS-SUBORDINATE APPRAISAL
- Appraisal has great potential which is not often translated into performance.
- Appraisal of personal qualities does not establish learning needs.
- Boss's multiple roles are likely to create inconsistencies
- Subordinate has conflicting objectives too.
- Normal behaviour patterns may persist

Multiple roles as :
- boss, - judge,
- coach, - counsellor,
- divine.

Subordinate has to :
- Offer knowledge of self,
- Be honest (how honest),
- Admit weaknesses,
- Protect own interests,
- Confront issues,
- Not offend, but maintain relationships.

dominance / submissiveness
aggression / defenciveness
emotional / rational
expecting / getting little
little

SELF ANALYSIS / APPRAISAL
The self motivated learner will
- Identify areas of weakness or low effectiveness,
- Translate these into performance characteristics, then...
- Get boss's agreement to defining prescribed performance.
- Seek validity of criticism in these areas.
- Differentiate behaviours likely to succeed.
- Identify how to achieve the desired behaviour

* COLLEAGUE FEEDBACK
* STUDYING COMPANY'S LONG-TERM PLANS
* WHAT MOTIVATES MANAGERS TO LEARN ?

COLLEAGUE FEEDBACK
- Short-term costs - feelings of embarassment; loss of face; subjective perceptions only.
- Long-term gains - true learning from experience; true problem-solving. (Did I really do that ?)
- Underused way to get an image of oneself.

STUDYING LONG-TERM PLANS
- What will the company be doing in 5 years ?
- Where do I see myself in 2 years & 5 years ?
- What do I need to do or know to be there?
- How do I begin to get those skills or knowledge ?

Motivation is intrinsic to the person.
- Stimulated by desires
  - to compete,
  - to improve oneself,
  - to emulate successful models., &
- One recognises a need in pursuit of self-esteem → A need to achieve & grow in the job

∝ ISSUE 1

THE CASE FOR SELF-DIRECTED LEARNING

* PREREQUISITES FOR PROCEEDING
* JUSTIFICATION FOR SELF DIRECTED LEARNING
* PERSONAL ATTRIBUTES

PRE-REQUISITES FOR PROCEEDING

- Realise that no-one has so much interest in you & your success
- Work out how to accommodate learning without neglecting your normal job.
- Identify your learning style & seek appropriate learning experiences link with that style.
- Recognise learning opportunities
- Accept certain premises

Most managers admit, with hindsight, they learned most from experiences on-the-job yet find difficulty planning to use work for learning experiences. Don't separate learning from managerial duties.

(3 out of 4 YES's are needed to the following Q's)

- Are you capable of dissatisfaction with your current performance, skills, knowledge, etc. ?
- Do you accept you can learn by planned direction as well as by accident ?
- Do you recognise that managerial activity may have more than one purpose ?
- Will your boss (organisation) support or reward your efforts.

- Learning is influenced less by age than self perception.
- If you say you can't - you're right!
- If the motivation is there - you'll learn
- Learning opportunities are more easily recognised retrospectively.
- General climate favours 'get things done' rather than 'plan to get things done'.

Look to real time learning because there are fewer opportunities for anything else.

JUSTIFICATION FOR S.D.L.

- Management truth is fallible & unsystematised
- Managers need to be motivated & committed to Mgt. Dev't.
- More chance that learning will satisfy real needs if learner seeks to behave differently

- Managers have freedom to choose what to beleive.

REMEMBER - Managerial learning is a social rather than a solitary experience.

NECESSARY ATTRIBUTES

- Seek yourself
- Face the risk of failure
- Analyse successful behaviour in others
- Listen effectively to others
- Seek feedback on your performance
- Seek help

- Be analytical & self-critical.
- Self concepts will be challenged, &
- You must face the risk that weaknesses will be exposed.

Reflectively observe.....
- the real behaviour of experienced persons, &
- selectively imitate them (modelling).

- Concentrate on what others are actually saying.
- Control your feelings about the person speaking.
- Find ways to check understanding.
- Keep your own talking to a minimum.

- Help with needs analysis from Trg. Officer

PROBLEMS WITH SEEKING HELP
- Knowing when you need help.
- Where to look for help.
- What costs may be involved.
- Colleagues, though willing, are unskilled at offering feedback & help.

- You need to help others to help you with objective feedback on your performance

- You don't want their perceptions, just facts.

ON-THE-JOB MANAGEMENT DEVELOPMENT (of others)

Specialists into Generalists

* PLAN THE DELEGATION OF RESPONSIBILITY

* ALLOCATE SUBORDINATES TO SPECIFIC PROJECTS

PLAN DELEGATION Ask:-
- Why do I do this task?
- Who else could do it for me,
  - now
  - after coaching/training
- Set objectives for delegation activities & a time scale.

What training/coaching?

SPECIFIC PROJECTS
- Challenge subordinates in a practical, useful manner.
- Broadens experience; thinking abilities; planning & reporting skills.
- Develops reasoning & ability to accept responsibility & handle info.
- Identifies areas of skill deficiency.

OUTCOMES
- Better motivated subordinates;
- Time freed for other purposes;
- A supply of able junior managers.
- Growth in subordinate.

RISKS
- Mistakes, errors in in the short term.
- Job impoverishment for boss.

- Specific departmental jobs could become responsibility of a subordinate.
- Build in a 'report back' requirement.

OUTCOMES
- Time saved by boss.
- More confident subordinates.

* COACHING BY SUPERIORS

COACHING
- A good boss is the best coach & model a subordinate can have
- It can focus on an individual's needs in very specific areas
- It is necessarily job related activity & therefore relevant.

RISKS
- Coaching into bad practices.
- Not every boss can coach.
- Could develop into 'running the company down'.
- Keeps the boss 'on his toes' too if modelling good techniques/skills.

- Boss or subordinate would identify these.

* OTHER FORMS OF ON-THE-JOB DEVELOPMENT

OTHER FORMS
- Job rotation
- Attachment to committees
- Post-course follow up

JOB ROTATION
- Planned job changes between departments & functions widens experience & company perspective.
- Turns specialists into generalists.

ATTACHMENT TO COMMITTEES
- Sees/hears other department's views & problems.
- Broadens perspective of company activities.
- Chance to be given more responsibility & acquire more experience.

POST-COURSE FOLLOW UP
- Subordinate submits report of course & prepares action plans for future developments using new knowledge.
- Boss agrees action plan.
- Boss monitors innovations & looks for improving performance in subordinate.

THE CLIMATE FOR MANAGEMENT DEVELOPMENT

* THE ORGANISATIONAL CLIMATE
* THE MANAGERIAL CLIMATE
* THE HOME INFLUENCES

ORGANISATIONAL CLIMATE
- Comprises a set of unwritten rules (behaviour norms) which may encourage or discourage learning thro' a system which rewards some activities & not others

LEARNING does not remain effective unless reinforced in some way :
- by reward,
- by recognition.

Too distant a reward may be ineffective. Lack of reinforcement extinguishes new behaviours.

Managers will expend energy accordingly.

MANAGERIAL CLIMATE

Features of this are :-
- Complexity
- Conflict
- Paradox

- Managers often don't know the scope of their authority/ responsibility to influence matters (especially in matrix organisations.)
- Line managers approach to short-term problems (strong; quick & decisive) is often inappropriate in other managerial environments
- Clarifying objectives, priorities & relationships only sharpens conflict.
- Need to avoid insecurity & risk yet still try new ways & new methods.
- Managers lack skills to cope with :-
  - competing objectives,
  - role conflicts,
  - seeing conflict as a positive process,
  - dealing with interpersonal aspects of conflict.

HOME INFLUENCES
- Spouses can affect levels of motivation when planning :
  - to progress in a career
  - to study & develop oneself
- Spouses can support the manager in times of stress & anxiety

- By listening.
- By supporting decisions.
- By agreeing to re-locate.
- By being supportive.

* USING YOUR BOSS AS A DEVELOPER
* USING COLLEAGUES AS MODELS
* POTENTIAL PROBLEMS WITHIN THE M.D. CLIMATE

USING YOUR BOSS AS DEVELOPER

A good boss can be the most significant learning experience in one's carreer by :-
- Creating a learning environment
- Creating a climate about the desirability of learning
- Offering the opportunity to apply new skills

By identifying learning opportunities.

COLLEAGUES AS MODELS
- By modelling desirable skills & behaviours.
- By learning with you.
- By offering feedback on aspects of your performance

- Helping transfer theory ➤ practice.

A GOOD BOSS
- Will identify strengths / weaknesses of subordinate.
- Possibly reward enterprise.
- Will share problems with the subordinate.
- Will make time to listen to the subordinate.
- Can involve the subordinate in boss's own tasks (not delegation).
- May assume the role of model of....
  - good practice,
  - one who is still learning too.

POTENTIAL PROBLEMS
- Concentration upon single-purpose activities rather than multi-purpose activities
- There may be disadvantages in always repeating the known &/or successful activities.
- Problems of external courses.

- Motivation to learn occurs more strongly at work & not the place of learning.
- No uniquely appropriate method.
- Frequent poor match between learning opportunities needed & those offered.
- Mismatch of perceived role requirements & objective job requirements.

GETTING THE BEST OUT OF COURSES

* YOUR RESPONSIBILITIES
* THE COMPANY PERSPECTIVE
* INVOLVING / CONCERNING YOUR BOSS

YOUR RESPONSIBILITIES

- Examine your Job Description to see where the course would help you.
- Identify :
  - what the course offers, (study course objectives)
  - what you want from it. (set own objectives)
- Explain your requirements to the course tutors.
- Improve your recall
- Decide - are you achieving your objectives ?

- If not, tell the tutors. They will want to know.

- Improve note-taking skills.
- Review your daily learning.
- Try out new ideas.
- Actively participate, get involved ?

- Provide ideas & situations to reflect upon.
- Collect papers, articles & references to read later.

THE COMPANY PERSPECTIVE

- Is it 'value for money' ?
- Has it improved your performance as indicated
  - by your thinking ability
  - by your managing ability

Participant now :

- Asks superiors for clearer statements of objectives; performance standards; authority ; responsibility; etc.
- Revises Job Description as a basis for discussion.
- Plans use of time.
- Seeks more responsibility & independence of action.
- More willingly cooperates with superiors & colleagues.

Participant now :

- Shows challenging approach to job.
- Questions purpose & objectives of assignments.
- Offers advice; solution; recommendations.
- Is more analytical & constructively critical of methods & routines

Value for money ?

- A course is a business investment only in 'persons' & not 'capital equipment'.....

To :

- Improve your performance in your present job &/or
- Equip a manager with knowledge & skills the company will need in the future.

BOSS'S INVOLVEMENT

- Brief participants on the course content & why they are being sent
- Attend the last day of the course.
- De-brief participants, encourage a presentation to colleagues / dept.
- Agree ACTION PLANS with participants.
- Encourage (don't frustrate) use of newly acquired knowledge & skills by the participants.
- Circulate good ideas & course materials to the department (where appropriate).
- Be sympathetic, tolerant, patient & supportive of attempts to improve performance

- Only send people who want to go.
- Don't expect personalities to change.

- It will come, but it may take time.
- Don't assess the course too soon.

Issue 1 α

THE CHARACTER OF ACTION LEARNING

* THE CHALLENGE OF CHANGE
* ADAPTION & SURVIVAL
* WHAT CONSTITUTES A 'LEARNING COMMUNITY ?

CHANGE brings with it :-
- Risk, & a response to the challenge of risk.
- New problems requiring new responses.
- Innovation, evidence of learning from past happenings.

In Industry & commerce the challenge is 'adapt or die'.
- Currently successful countries (Sweden & Japan) were ready to learn new skills. They grew.
- In U.K., past successes proved a blockage to learning fresh things. Growth very limited.

SURVIVAL
- If rate of change > rate of learning, the organism/organisation fails.
- If rate of learning > rate of change, the organism adapts survives & may even grow.
- Overcoming uncertainty requires the right 'leaders'

'LEADERS'
- 'Leaders' are needed who will support by personal example.
- 'Leaders' are not necessarily 'experts'
- 'Experts' are not necessarily 'leaders'

'EXPERTS' accumulate & purvey programmed knowledge. (P)

'LEADERS' must develop the ability to ask fresh & useful questions of a threatening future. (Q)
- We cannot be certain that this is a skill which can be 'taught'.
- They may persue these activities best in a 'learning community'.

A LEARNING COMMUNITY

Possibly a group of managers where :-
- REAL people tackle REAL problems in REAL time.
- We have people with responsibility for jobs but are uncertain of how best to tackle them
- Members proceed by 'trial & error' & by exchanging comments, advice, criticisms & support.

- Cannot rely upon experts for right answers.
- Can ask experts for specific information.

* HOW DO 'COMMUNITY' MEMBERS PROCEED ?

PROCEDURE :-
- Individuals seek outcomes to project problems in conditions of high uncertainty
- Managers clarify to each other.....
  - what they believe are their problems,
  - what they think ought to be done,
  - what they think may be the outcome of their actions.
- Managers seek/accept advice, criticism & support from peers or equals
- It does not involve experts & authoritarian teaching to produce individual learning.
- It follows identifiable phases

- The real project problems are pressing obligations assigned to the particular manager (learner) within the company.
- Senior management must :-
  - 'own' the problem, &
  - be committed to its solution, &
  - sponsor the implementation of the corrective action.

- May be from similar jobs but different settings.

PHASE 1 'Diagnostic'
- Analysis,
- Development,
- Procurement.

→ PHASE 2 'Therapeutic'
- Assembly,
- Application,
- Review.

FEATURES OF SUPER-LEARNING (S-L)
(& SUPER-MEMORY)

* PRE-CONCEIVED FEATURES OF NORMAL LEARNING
* FACTS ABOUT S-L TECHNIQUES
* KEY FEATURES ABOUT S-L

PRE-CONCEPTIONS ABOUT LEARNING Many believe:-
- Learning is unpleasant.
- We have a limited capacity.
- We forget quickly.
- Our ability to learn diminishes as we age.
- Learning will collapse when are under stress

→ SUPER-LEARNING techniques show these are all MISCONCEPTIONS

Psychologists & educationists have long asserted that only about 10% of the brain's capacity is ever used. Chinese & E. European cultures have long experience of Super-learning. Russia & United States are catching up (for strategic & social reasons.)

WITH S-L TECHNIQUES
- We learn at 2 levels → What we see & hear, also at an intuitive level.
- As you learn you start to feel good → Snowball effect:-
  - Feel good about yourself & achievements.
  - Achieve more learning.
  - Feel good about others too.
- Learning means 'growing' & growing is what life is about.
- S-L is not 'sleep learning' → One does not lose consciousness as in sleep but remain in complete control of your faculties.
- S-L techniques have beneficial 'spin-offs' →
  - Awakens creative & intuitive abilities.
  - Works holistically to develop mind & body reserves.
  - Often leads to re-balanced health.

KEY FEATURES OF S-L Incorporates:-
- **BREATHING** - rhythmic; controlled;
- **MUSIC** - rhythmic; controlled; (largo) 1 beat/second;
- **CONSCIOUSNESS** - controlled through concentration & meditation;
- **INFORMATION TO BE LEARNED** & the method of inputting it.

→ Body rhythms are calmed & the mind becomes more receptive. (Has parallels with yoga & other meditational activities.)

- Information is fed to the learner in fragments in 8 second phrases.
- 1st LEVEL Read (over the soft musical background) to the learner.
- 2nd LEVEL Add the non-verbal cues between teacher & learner for rapport. Repeat the information with different intonations.

OUTCOMES are widely researched. with:-
- Proven results in many disciplines, including management.
- Very rapid learning of factual info.
- Very high recall ability (→ 90%+)
- Improved creative/intuitive abilities.

Everyone already has the ability to benefit from Super-Learning. Our brains absorb everything we see, hear & experience with sponge-like facility but we lack the corresponding recall facility to unlock the memories with training in S:L techniques.

Recommended reading:-
'Super-Learning' 1979 Souvenir Press
Ostrander, S. & Schroeder, L.

ON CHANGING YOUR JOB

* THE TRANSITION STAGE
* NEGOTIATING YOUR TRANSITION
* HOW LONG ?

THE TRANSITION STAGE
Negotiating a successful transition between jobs seems to follow recognisable stages :-
- SETTLING IN PHASE - a slight fall in effectiveness
- LEARNING THE JOB PHASE - a pronounced fall in effectiveness
- BECOMING EFFECTIVE PHASE - succeeding (or succumbing to the Peter Principle.)

Does not have to mean a change of organisation or location.

THE PETER PRINCIPLE (1969)
Sooner or later most people will rise to their level of incompetence.

If changing organisations, expect the :
- CULTURE SHOCK as you encounter new people, new procedures, new buildings & traditions.
- THE WELCOME everyone assists you with advice & guidance.
- THE EXPECTATIONS are not too great as yet.

(The person uses skills which worked before & a slight fall in effectiveness is accepted. This phase may last weeks.)

NEGOTIATING YOUR TRANSITION If you know the pitfalls & stages in advance, you can reject the Peter Principle so :-
- Learn to manage the change
- Learn how to influence people. (Politically when necessary.)
- Develop yourself.

HOW LONG ?
- The transition may take from 1½ to 3 years to complete.

- Accept the behaviour norms of the new organisation.
- Learn to 'play the system'.
- Learn from mistakes.

LEARN TO MANAGE
- Identify the symptoms
- Take your time

- Expectations of others increases; demands grow; conformity desired.
- Former skills may not suffice. Shortcomings evident to oneself.
- The need to succeed generates stress & depression sets in.
- Recognises a need to change oneself & learn new techniques & coping skills. (This phase may last for several months.)

This may be happening to you; or you may identify the symptoms in superiors, colleagues, subordinates or friends who are undergoing transition themselves.

TAKE YOUR TIME
- Make friends who will provide you with information; feedback on your performance; who will help you to become better integrated socially.
- Learn the rules & norms before trying to make an impact. Others may feel threatened.
- Be sensitive to your strengths & weaknesses.

- Releases the past & accepts the new reality.
- Uses new skills & becomes pro-active.
- Consolidates new attitudes & behaviours.

(If the transition is not negotiated successfully others may quote the Peter Principle. This phase may take more than a year.)

IDENTIFY SYMPTOMS
- Forewarned is forearmed.
- The greater the change the greater the stresses.
- Those who favour stability & tradition are worst affected.

WAYS OF ENCOURAGING CREATIVITY

* HELPING CREATIVITY TO FLOURISH
* CREATIVITY TECHNIQUES

HELPING CREATIVITY

- Encourage an environment where
  - new ideas are welcomed,
  - old ideas are challenged.
- Encourage high levels of trust → & a willingness to experiment with strange ideas.
- Make structural changes
  - Set up an autonomous dept. or section to deal with it.
  - Hive off ideas to small, separate independent organisations under the parent company.
  - Contract the work out to specialist agencies (eg Advertising). Being too close to a problem alters your perspective. Detached persons are less inhibited by real or imagined constraints.
- Offer inducements which will .....
  - .....find ways to develop skills; promote creative talents in others & free the mind of inhibiting influences.

> Some creativity lies within all of us but creative activities are not for every person. Creative blocks may be perceptual, cultural or emotional.

- Follow checklists of words & questions which challenge you to think creatively about a problem → CHECKLISTS
- Brainstorming & reverse brainstorming
- Synectics
- Free association / mind maps / or Keyword patterns
- Creative dreaming
- Attribute listing
- Group management
- Morphological analysis

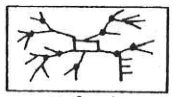
CHECKLISTS

- They sharpen one's focus on the subject matter.
- Better for simple rather than complex situations.
- Utilizes past experiences.

BRAINSTORMING & REVERSE B/S

- Traditional brainstorming acts to produce more & more alternatives.
- Reverse b/s tears down & purges product features critically searching for negative features. List them & force thinking upwards to counter these adverse features.

KEYWORD PATTERNS (Pictures, Diagrams)



- Display all features of the subject (or problem) & associated ideas without consciously organising them.
- Seek creative possibilities which take account of known (illustrated) features.

SYNECTICS

Involves a group working for a client.

- Client - explains P.A.G. (Problem as Given)
- Group - brainstorm alternative solutions.
- Client - selects most likely alternative.
- Group - brainstorms 'How to's..?' to achieve the selected alternative.

CREATIVE DREAMING

Think BIG! Imagine the most spectacular & ambitious solution to your problem. Then scale it down & modify it to suit reality.

MORPHOLOGICAL ANALYSIS

- Situational characteristics are listed & systematically cross-tabulated to produce new pairings for consideration.

GROUP MANAGEMENT

- Ideally the groups would have selected personnel with particular attributes eg. an expert; a dreamer; a confronter; a helper (for group maintenance); a persuader; a process leader (chairman or manager); a client (with a problem).

ATTRIBUTE LISTING (for a product)

- Easy to use and skills will develop.
- List the product attributes then consider how each may be improved / modified. → Commonly physical attributes.
- List the logical activities in a particular PROCESS. Explore each to see if modification; re-arrangement; substitution; etc. may be feasible to the betterment of the system.

ON CHANGING YOUR JOB

* THE TRANSITION STAGE
* NEGOTIATING YOUR TRANSITION
* HOW LONG ?

THE TRANSITION STAGE
Negotiating a successful transition between jobs seems to follow recognisable stages:-
- SETTLING IN PHASE - a slight fall in effectiveness
- LEARNING THE JOB PHASE - a pronounced fall in effectiveness
- BECOMING EFFECTIVE PHASE - succeeding (or succumbing to the Peter Principle.)

Does not have to mean a change of organisation or location.

THE PETER PRINCIPLE (1969)
Sooner or later most people will rise to their level of incompetence.

If changing organisations, expect the :
- CULTURE SHOCK as you encounter new people, new procedures, new buildings & traditions.
- THE WELCOME everyone assists you with advice & guidance.
- THE EXPECTATIONS are not too great as yet.

(The person uses skills which worked before & a slight fall in effectiveness is accepted. This phase may last weeks.)

- Expectations of others increases; demands grow; conformity desired.
- Former skills may not suffice. Shortcomings evident to oneself.
- The need to succeed generates stress & depression sets in.
- Recognises a need to change oneself & learn new techniques & coping skills. (This phase may last for several months.)

- Releases the past & accepts the new reality.
- Uses new skills & becomes pro-active.
- Consolidates new attitudes & behaviours.

(If the transition is not negotiated successfully others may quote the Peter Principle. This phase may take more than a year.)

NEGOTIATING YOUR TRANSITION If you know the pitfalls & stages in advance, you can reject the Peter Principle so :-
- Learn to manage the change
- Learn how to influence people. (Politically when necessary.)
- Develop yourself.

HOW LONG ?
- The transition may take from 1½ to 3 years to complete.

LEARN TO MANAGE
- Identify the symptoms
- Take your time

- Accept the behaviour norms of the new organisation.
- Learn to 'play the system'.
- Learn from mistakes.

TAKE YOUR TIME
- Make friends who will provide you with information; feedback on your performance; who will help you to become better integrated socially.
- Learn the rules & norms before trying to make an impact. Others may feel threatened.
- Be sensitive to your strengths & weaknesses.

IDENTIFY SYMPTOMS
- Forewarned is forearmed.
- The greater the change the greater the stresses.
- Those who favour stability & tradition are worst affected.

This may be happening to you; or you may identify the symptoms in superiors, colleagues, subordinates or friends who are undergoing transition themselves.

Contents

PART 1 MANAGERIAL SKILLS

Changing People's minds (as Individuals)	4.01
Changing People's Minds (in Groups)	4.02
Two Models of Influencing	4.03
Encouraging Creativity in Organisations	4.04
Brainstorming	4.05
Problem Solving (by setting objectives)	4.06
A Guide to Delegation	4.07
Leadership - What's the answer	4.08
Some theories on Management	4.09
Incrementalism in Decision Making	4.10
Functions of a Manager	4.11
Roles in Organisations	4.12

PART 2 ORGANISATION

Corporate Strategic Planning	4.13
Strategic Planning 1	4.14
Strategic Planning 2	4.15
Business - A 'Systems' view	4.16
Systems Theory - What use is it ?	4.17
Modelling an Effective Organisation	4.18
Designing Organisations 1	4.19
Designing Organisations 2	4.20
Implications of Information Technology	4.21

PART 3 THE ELECTRONIC OFFICE

Implementing Computerised Systems	4.22
Future Electronic Office Work 1	4.23
Future Electronic Office Work 2	4.24
Changing to an Electronic Office	4.25
Supervising Change in an Electronic Office	4.26
Electronic Office - Factors increasing motivation	4.27
Health & Safety in an Electronic Office	4.28

PART 4 MARKETING & ADVERTISING

Challenging the Product Life Cycle concept	4.29
Building Marketing Expertise	4.30
The Distribution Audit 1	4.31
The Distribution Audit 2	4.32
Marketing - Customer v Competitor Orientation	4.33
Advertising 3 - Evaluation	4.34
Watching your Competitors	4.35

PART 5 PRODUCTION & QUALITY CONTROL

Role of Production Control	4.36
Production Control - Production Planning Stages	4.37
Production Control - Shortening Deliveries	4.38
Simulation in Production Control	4.39
Quality Control	4.40

PART 6 PERSONNEL MANAGEMENT

Group Morale	4.41
Managerial Incentives	4.42
Remuneration & Financial Reward	4.43
How to avoid Conflict	4.44
Resolving Conflict between Groups & Individuals	4.45
A Training Philosophy (Courses)	4.46
Skill Training & Analysis	4.47
Training Aids	4.48
Selection (by setting objectives)	4.49
Discipline (by using objectives)	4.50

PART 7 KEYWORD INDEX

Keyword Index	pp51-55

CHANGING PEOPLE'S MINDS (AS INDIVIDUALS)

Rx • Receiver Tx • Transmitter

- ✳ CHANGING ATTITUDES
- ✳ CONSIDER THE RECEIVER
- ✳ CHARACTERISTICS OF THE TRANSMITTER
- ✳ CHARACTERISTICS OF THE MESSAGE

CHANGING ATTITUDES involves a tri-partite interaction between :-
- a person,
- a medium (or social mechanism),
- a message.

Our attitudes do change during life to keep our cognitions in line with reality.

Factual information alone is rarely a determinant of attitude change.
Deep seated attitudes based on old prejudices & fears for security are difficult to change.

CONSIDER THE RECEIVER
Features of the Rx are their :-
- Persuasibility
- Suggestibility
- Influence of the comm^{n}. upon them
- Disposition towards Tx

These features vary between individuals & between topics for consideration.

- How they respond to a direct attempt to influence them.
- How they respond to any action whether intended to change their behaviour or not.

CHARACTERISTICS OF Tx
The CREDIBILITY of the Tx depends upon their :-
- Expertness
- Trustworthiness
- Degree of Similarity/ Attractiveness

- Do they perceive Tx as having intent to persuade or something to gain ? Less trustworthy !
- A favourable disposition means influence is accepted.

COMPLIANCE - people accept influence hoping to achieve a favourable reaction (or avoid punishment).
IDENTIFICATION - a person adopts the behaviour of another person or group for satisfying reasons of alignment & association
INTERNALIZATION - accepts the influence as it is congruent with their value system.
(1 or all may happen simultaneously).

- Messages from credible fellow-workers (gp. members) have greater impact than from those perceived as dis-similar.

- Are we receiving the best (or correct) information.
- Is it the Tx's intent to give us the best information ?
- Tx's personality characteristics, physical appearance & speech must be right. (Transmitted non-verbal cues.)

- Junior managers adopt behaviour, dress, language, etc. of senior managers they admire.

Has the Tx specialised training or education ; unique experience ; position &/or social status ?

CHARACTERISTICS OF MESSAGE
Will it incorporate :-
- a 1- or 2-sided argument ?
- fear-arousing communication ?
- innoculative effect ?
- good & bad news ?

1-sided for less intelligent Rx's (or those who are already friendly & receptive).
2-sided to an intelligent audience which is initially opposed to the message.

If both must be presented, give the good news before the bad news.

Less effective since it produces cognitive dissonance in Rx's who reject the message.

2-sided persuasive communications benefit from an 'injection' of a weak counter message.

The Total Situation (Tx, Rx & Message)
- Nothing makes a person change their attitude against their will.
- A favourable climate will facilitate the communication if Rx is willing to receive the information eg. when food is eaten. (Supports the business lunch.)

∝ Issue 1

CHANGING PEOPLE'S MINDS (IN GROUPS)

- ✳ THE ROLE OF OPINION LEADERS
- ✳ USING GROUP FORCES IN PERSUASION
- ✳ MAIN FEATURES OF GROUP DECISION MAKING
- ✳ INFLUENCING MINDS & BEHAVIOUR

OPINION LEADERS are usually members of the group who are perceived as having a specialised area of information (the latest)
- Representing or personifying values or attitudes the group hold.
- Having expert knowledge
- Being centrally located in the social structure

→ - The more closely knit the group, the greater the influence of opinion leaders in resisting persuasion or strengthening acceptance.

→ - Becoming a focal point of informal communication.

Tx = Transmitter or Communicator

USING GROUP FORCES Goes through several stages but can be ten times as effective as other methods :-
- Issue is presented as a lecture or statement by the Tx
- Group discusses their feelings & voices their objections.
- Tx recognises & accepts objections without disapproval
- Tx answers requests for info^n &/or clarification for the group
- Tx encourages group to discuss the issues to meet objections.
- Group members decide if they will carry out the desired behaviour

→ - Unfreezing; establishing new attitudes; refreezing. (Lewin)

→ - Method depends on the motivation of the group.

→ - May even welcome them.

→ - Perceived group consensus is determined.

GROUP DECISION MAKING Involves choice & commitment.
- Group participants actively & personally involved.
- They see others will 'move'.
- They don't feel pressured.
- They are required to commit themselves.
- They see others commit themselves.

→ - Group pressures push individuals to commit themselves to change.
- By choosing to carry out non-preferred behaviour (change), cognitive dissonance is increased.
- Dissonance reduced by individual's attitude changing.

INFLUENCING MINDS & BEHAVIOUR may be achieved by :-
- Providing more information
- Enforcing the change
- Change their personality
- Change their group affiliation

→ - Not enough on its own.

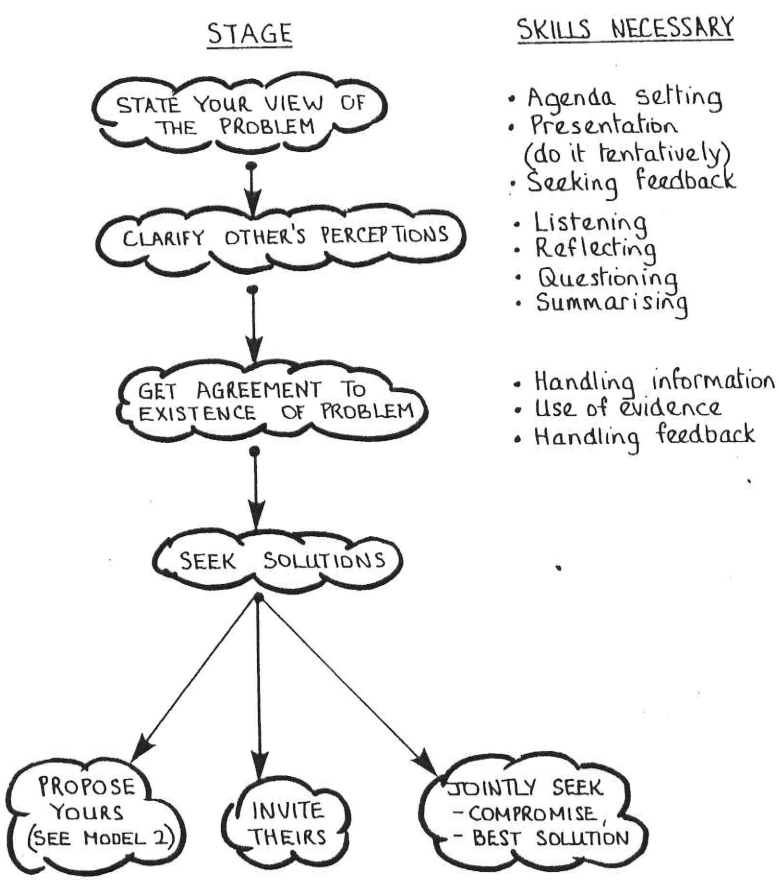
→ - Switch/move individuals between groups at work/within the organisation eg. job rotation.

→ Social change followed by attitude change may be introduced by legislation eg women's rights.

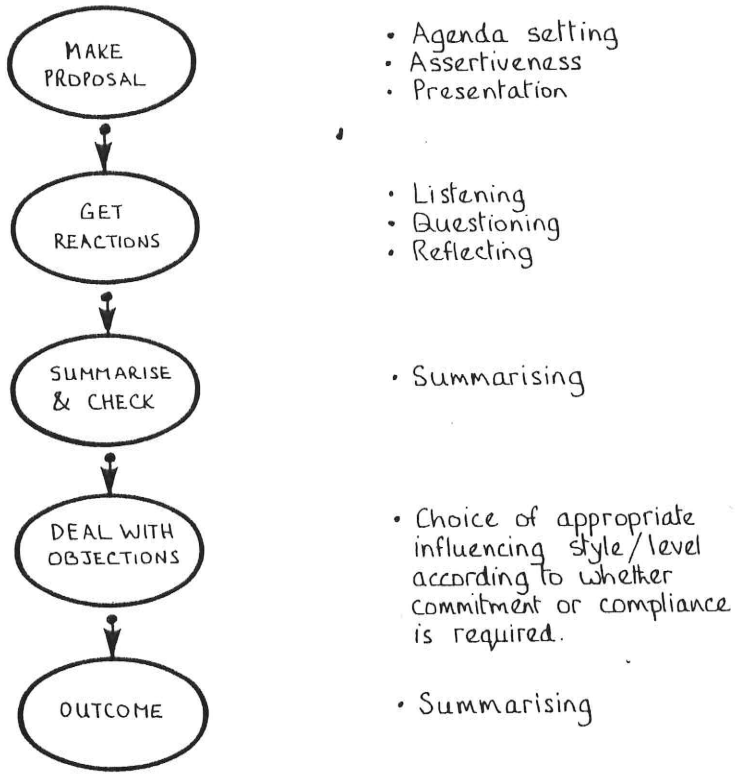
→ - By helping them grow & mature.
- Through training; educating; supporting.
- Lower their self perception & satisfaction to motivate them to change their self-satisfaction & reduce dissonance.

2 MODELS OF INFLUENCING

① SOFT



② HARDER



ENCOURAGING CREATIVITY IN ORGANISATIONS

(considering objectives)

* ✳ AN EXECUTIVE VIEW
* ✳ WHAT TYPE OF CREATIVITY ?
* ✳ TALKING WITH SUBORDINATES

AN EXECUTIVE VIEW

- Managers who do not innovate, or encourage innovation, are merely fulfilling the maintenance requirements of their position
- Not all innovation can be expected to succeed & some failures may be permissible
- Those who succeed should be allowed greater opportunity & support to innovate further.

→ They should be barred from consideration for promotion, bonuses, etc.

- Don't hold people accountable for things totally beyond their control.
- Don't dwell on isolated incidents at the expense of overall results.

TYPES OF CREATIVITY

- Extrinsic creativity - brings in new ideas from outside the org^n.
- Intrinsic creativity - develops new systems or procedures within the organisation

TALKING WITH SUBORDINATES

- Make it clear why you are seeking innovation & ask for it
- Seeking innovation should not be confused or coupled with pressure to improve performance.
- Use interrogative techniques to seek reflective responses & constructive analyses of problems.
- Develop a commitment to new objectives with individuals & teams.

- Generates a defensive attitude in subordinates.
- Dis-satisfaction with the status quo should be a normal attitude for managers.

INTRINSIC CREATIVITY

- Review & analyse past results with subordinates.
- Interpret them to add meaning to the data.
- How well did they satisfy earlier objectives ?
- Seek agreement on ways to improve in the future.
- Separate 'management' problems from, say, 'production' problems.
- Deal in facts (not personalities)
- Agree a statement on new objectives.

- Don't exclude opinions.
- It may help to display info^n visually, in different ways & in different orders, to see relationships differently.
- Consider the PARETO PRINCIPLE (80:20 law) to identify the vital few from the trivial many

→ - Don't chase perfection if the last 20% will cost too much.

EXTRINSIC CREATIVITY eg.

A manager may develop lay knowledge of new methods/ equipment / processes / etc.
Conducts feasibility studies
Institutes change

- Observes procedures for minimising adverse reactions by anticipating resistance at many levels.
- Communicates objectives & expected benefits; Timetables introduction; etc.
- Increases scale of innovation; monitors & evaluates progress against objectives. Formulates new objectives.
- Maintains executive support for the innovation. Identify, reinforce & reward new attitudes & behaviour.

- Seeks executive support for innovation.
- What changes & costs are involved?
- What impact upon the org^n. or its culture ?
- Set objectives for its introduction.

BRAINSTORMING

* WHAT IS BRAINSTORMING ?
* HOW TO BRAINSTORM

WHAT IS BRAINSTORMING ?

- The use of a group of people ....
  to generate ideas ....
  to develop solutions to a problem.

(Also possible as a solo activity)

HOW TO BRAINSTORM

Consider :-
- Attitude
- Mechanism

ATTITUDE FOR BRAINSTORMING

- The attitude of mind
- Creating a positive attitude
  - Prefix ideas with : 'How to .....'
  - Prefix solutions with : 'Go do .....'
  - Use positive response: Give 3 reasons why you like an idea before any reasons for not liking it.

ATTITUDE OF MIND

- Suspending evaluation. (Nobody evaluates ideas by any means eg. words; tones; non-verbal behavioral cues; for fear of stopping flow of ideas. Even useless ideas may stimulate thought & generate useful ideas.)
- Freewheeling/imaging. (Participants must not fear being 'wrong' or appearing 'foolish'. Free flow of novel ideas can produce breakthrough to previously insoluble problems. Participants should challenge obvious answers & ideas tried unsuccessfully earlier.)
- Producing many ideas. (Unpractical ideas may be rejected later but first objective is to get around mental blocks.)

MECHANISM FOR BRAINSTORMING

- State the problem
- Prepare to brainstorm
- Freewheel & dream up ideas
- Evaluate

STATE THE PROBLEM

- State problem in as many ways as possible prefixed by "My problem is how to ....."
- Select 2 or 3 of these statements & rephrase them saying, "In how many ways can I....."

PREPARE TO BRAINSTORM

- Loosen & warm up the group on a different problem to start them thinking creatively. (In pairs)
- Share the ideas with the group.

FREEWHEEL & DREAM UP IDEAS

Roles within the group :
- CLIENT problem owner/ power to act / solution owner.
- LEADER chairman/ scribe/ notes headlines.
- PARTICIPANTS generators / catalysts / take notes.

Look for many ideas. (25 → 30)

EXCURSIONS

- If ideas wont flow - try fantasy excursions to loosen thinking, eg. 'unlikely careers'

EVALUATE

- Use a smaller team. (The ultimate choice of alternatives must be by the person who owns the problem, who has power to act & who owns the solution.)
- Group ideas into classes. (Each group of ideas will suggest a process. Select solutions from these processes.)
- Select the most acceptable solution. (The most acceptable solution will have considered the irrational & emotional factors :-
  - What does the problem owner want ?
  - How can this be justified ?)

PROBLEM SOLVING (USING OBJECTIVES)

* WHEN IS THERE A PROBLEM ?
* PROBLEM SOLVING STAGES
* WORKING WITH SUBORDINATES

WHEN IS THERE A PROBLEM ?

There is a problem when there is unacceptable variance between the present condition/situation & a planned objective

- Know why you want to solve it & suggest an 'ideal solution'.

BIG PROBLEMS started out as little problems, but were ignored!

PROBLEM SOLVING STAGES

- Know where you are now
- Summarize your position
- Work out your 'ideal' solution & list some options to achieve it
- Screen the options
- Select & action the best alternative.

-What are the FACTS ?
-Collect & organise the facts.
(Facts are objective, verifiable & agreed-upon data.)
-What are you trying to accomplish ?

-If you know where you are (A), but wish to be somewhere else (B), you have a definition of the problem ► getting from A to B.

WORKING WITH SUBORDINATES

This problem solving technique & a suitable questioning style could be a basis for developing subordinates.

- Where are we now ? (A)
- What is the variance ? (Problem)
- What are the facts ?
- Where do we want to be ? (B)
- How will we get there ? (A→B) (Temporary objective)
- Have you screened the options ?
- Devise an action plan. (Problem solving objective)

To include :
- Action to be taken.
- By whom.
- Time control / restraints.
- Other constraints.
- Expected results.
- Method of verification.

(How do we know when we've succeeded ?)
This will tie the end conditions to measurable indicators.

Use a table

State — List — Predict

OPTIONS	OBJECTIVE :- [illegible] CONTRIBUTION TO OBJECTIVE	COST	FEASIBILITY	SIDE EFFECTS
1. [illegible]	high	high	low	many
2. [illegible]	low	low	high	non
3. [illegible]	high	low		
4.				
DESIRED OUTCOME	HIGH	LOW	HIGH	FEW/NONE

Desirable or undesirable

It sometimes helps to display the facts & the situation visually in graphic or chart form or using keyword patterns (brain patterns.)

A GUIDE TO DELEGATION

* WHY DELEGATE TASKS ?
* REASONS FOR NOT DELEGATING
* WHAT MAY BE DELEGATED ?
* WHAT NOT TO DELEGATE

WHY DELEGATE TASKS ?

- To release your own time for other activities.
- To develop & motivate a subordinate.
- For the wrong reasons

Develop by job enrichment or through coaching or training.

WRONG REASONS The manager:
- Doesn't like the task.
- Cannot do the task.
- To penalize someone they dislike.
- You know they wont turn it down.

REASONS FOR NOT DELEGATING

- To maintain an impression of overwork & an aura of being indispensible.
- Fear of job impoverishment.
- They enjoy doing the task
- They believe no one else can do it as well as themselves

- Managers should occasionally ask themselves :
  - Why am I doing this ?
  - Could someone else do it ?
  - Should someone else do it ?

- Often a strong excuse for not delegating but never a wholly valid reason for not delegating.

- They believe the time taken to instruct others could well be used to complete the task themselves - a short-sighted view which fails to develop their subordinates.
- Perhaps they are the only ones who can do it. Unlikely, give subordinates a chance to try & learn.

- Softened by explaining the reason for having to delegate them.
- Assisted by the use of algorithms which pushes decision-making down to lower paid operatives so releasing higher paid managers for other tasks.

WHAT MAY BE DELEGATED ?

- Routine tasks & decision making to subordinates
- Whole tasks
- Tasks that others could do more competently & possibly more cheaply

Understand your own limitations and be honest.

- Which are within the capabilities of the subordinate, & which ....
- will give the subordinate a sense of achievement when satisfactorily completed.

Delegatee must have:
- precise instructions,
- freedom to ask questions & seek clarification,
- clear authority & resources to complete the task.

WHAT NOT TO DELEGATE

- Ultimate responsibility for the tasks.
- Tasks without adequate guidance on parameters; methods to use; costs; objectives; limits to authority; time constraints; etc.
- Unpleasant tasks which are rightly your responsibility

eg. giving a reprimand or dismissing someone.

- If managers appraised their subordinates they may discover hidden/latent talents which could benefit the organisation.
- Delegators must monitor progress & seek completion of the tasks.
- Sub-delegation not permitted without seeking permission first.
- On completion - give feedback & praise or credit where appropriate

LEADERSHIP - WHAT'S THE ANSWER?

* LEADING vis-a-vis MANAGING
* INFLUENCE OF FOLLOWERS ON LEADERS
* VALUE OF LEADERSHIP STUDIES
* DEPENDANT VARIABLES

LEADING v. MANAGING

- Production oriented organisations want managers first-leaders 2nd
- All managers are leaders (of a sort).
- Not all leaders are managers. The qualities of a leader are less important than understanding what behaviour influences work groups.

LEADERSHIP - influencing behaviour towards the achievement of organisational objectives. A leader is one who achieves results through people. Thinking of leadership in absolute terms is futile, rather consider it in terms of the interaction of several variables.

INFLUENCE OF FOLLOWERS

- How many followers can you manage?
- How well do they work together?
- How mature is the LEADER : FOLLOWER relationship? (See 'FOLLOWERSHIP' Outline)
- Is there a tradition of following?

LEADERSHIP STUDIES

- Make a manager more aware of what styles predominate.
- Help a manager identify his/her own predominant style.
- Help distinguish between more effective & less effective styles.

→ However, changing one's own style is not easy.

→ Manager is still left with the problem of turning theory into its practical application.

DEPENDANT VARIABLES

- Followers.
- Sources of authority
- Types of organisation
- Organisational culture or climate

→ A manager may have a legal right to manage but it is not a qualification to lead. Influence is merited & gained, not coerced or demanded.
- Conferred by the organisation.
- Authority from knowledge of product; process; superior training; experience; etc.
- Personal authority implied by charisma; personality & temperament.

Macro-factors - culture; ethos; society & political structure; etc.
Micro-factors - task; power & authority systems; work-mates; etc.

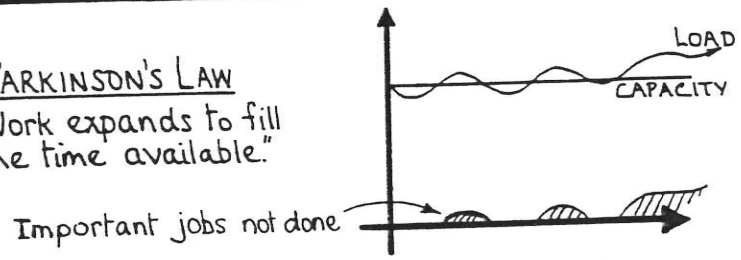
- Coercive Organisations - possibly high power-distance.
  - possibly non-legitimate authority.
- Utilitarian Organisations - medium power-distance.
  - rational-legal authority or
  - positional authority.
- Normative Organisations - lower power-distance
  - charismatic authority or
  - rational authority based on expertise.

Leaders are not born, at birth we have potentials but no gift of leadership. The SKILL MIX necessary depends on many variables like nature of the work & the work groups. No universal guidelines exist & every 'leader' has make his/her own way.

SOME THEORIES ON MANAGEMENT (could affect your use of time)

PARKINSON'S LAW

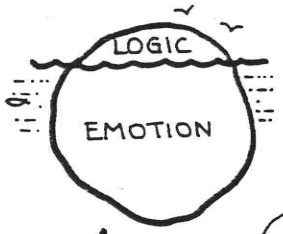
"Work expands to fill the time available."



How do I get the important jobs done despite the urgency of less important work?

ICEBERG THEORY

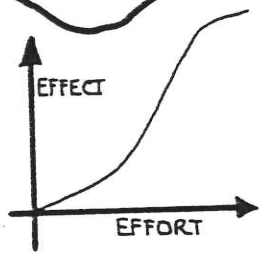
"Decisions are frequently taken for subjective intangible reasons."



I must be aware of my tendency to be illogical & subjective; & why others make decisions the way they do.

LAW of DIMINISHING RETURNS

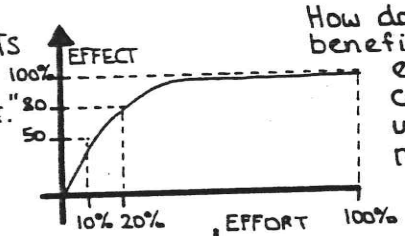
"Effect following action is not in a linear relationship with the effort put in."



How can I tell when a satisfactory standard is reached & avoid breaking off jobs.?

PARETO PRINCIPLE

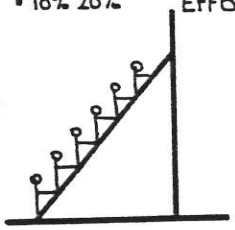
"A small proportion of elements is responsible for a large proportion of the total effect."



How do I get max. benefit from effort expended & control areas using lots of resources?

LADDER THEORY

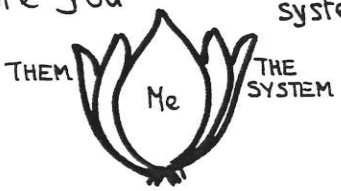
"An organisation is like men standing on a ladder - when you look up you see backsides - looking down you see brains



How to respect my boss so we can benefit each other? How to work better with my boss?

ONION THEORY

"A problem is like an onion. At first you only see the outside skins; how the system is affecting you; how they are affecting you. You must see your role before you can solve it."



How may I be aware I am contributing to the system - for good, - for bad.

INCREMENTALISM IN DECISION MAKING (D.M.)

* WHAT IS INCREMENTALISM ?
* INCREMENTALISM IN D-M
* USE IN POLICY MAKING
* VALUE OF THE INCREMENTAL MODEL

INCREMENTALISM suggests it is :-
- Easier to get agreement over changes which are small & not too radical
- Many little decisions 'at the margin' can have a cumulative effect
- Suited to short-term decisions

→ The need for radical change in organisations is rare.

→ People low in society (or the organisation) can change things incrementally.

INCREMENTALISM IN D-M
- Don't examine ALL possible alternatives in decision making.
- One seldom has time to seek for the 'perfect' solution.
- Only consider actions which are familiar & marginally different from the 'status quo'
- Work from the known to the unknown 'incrementally'

→ With limited variation from past policies

→ It is often easier to settle for just a satisfactory solution.

→ Imperfect decisions will be made.

→ Subsequent little changes will improve on earlier policy decisions.

→ It is too costly to make really great changes.

→ It is possible to retreat if a solution does not work without excessive costs or penalties.

USE IN POLICY MAKING
- Focus on policies which differ only incrementally from existing policies.
- Consider a small number of policy alternatives at any one time.
- Evaluate only a few
- This permits more 'means-end' & end-means adjustments

→ Problems become more manageable.

→ Since there are often no 'right' solutions, it permits a series of 'attacks' on the issues – separated by a series of analyses & evaluations.

THE VALUE OF THE INCREMENTAL MODEL
- Large changes unsettle people & organisations.
- Small changes are seen as 'remedial' & therefore less threatening

EXAMPLES :-
- Legislation concerning safety in cars (covering seat belts; lights; tyres; body-shells; etc.)
- Women's rights, equal pay & anti-discrimination legislation.
- 'Electronic' banking, credit cards & a 'cash-less' society.
- Metrication of imperial weights & measures.

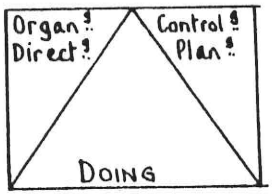
- Decision making between alternatives is only required when information is incomplete. When info^n. is complete - just follow the 'routine' solution.
- Incrementalism is sound in stable conditions where past experience offers a reasonable guide to the future.

FUNCTIONS OF A MANAGER

* FOUR ROLES OF A MANAGER
* MANAGING EFFECTIVELY
* MANAGERIAL PROGRESSION

MANAGERIAL PROGRESSION

As managers progress in seniority, time usage alters & they spend less time doing/producing on operational activities & more time in the functional roles described.



Senior Mgt.

Operators

MANAGING EFFECTIVELY

Requires a fusing of the 4 roles (with due attention to inter-personal relationships) to strike a balance between :-

- Fulfilling TASK needs
- Meeting INDIVIDUAL needs of staff
- Satisfying GROUP needs of their work teams/units/depts.

- for involvement,
- for Job Satisfaction,
- for communication ⇌
- for personal development,
- for satisfactory working conditions,
- etc.

MANAGER'S ROLES

- Director
- Controller
- Planner
- Organiser

ORGANISING

With the company objectives in mind :-

- How will you achieve the company objectives?
- Structure needs
- System requirements

- Are tasks sequenced properly?
- Are patterns of activity effective?

- Is the organisational structure such that.....
  - comm.ⁿ systems are working satisfactorily,
  - reporting patterns are clear & functioning,
  - responsibility/authority structures are clearly understood & functioning.

- Are human & technical resources being maximised?

- Get the job done...
  - to time,
  - to req'd quality standards,
  - to customer's satisfaction,
  - within set cost parameters.

∝ Issue 1

DIRECTING & CO-ORDINATING

Requires skills of :

- Observing → - the organisation as a whole, - the employees, - the environment in which the organ.ⁿ functions.
- Communicating → - informing, - enquiring, - instructing.
- Selecting → - identifying manpower resourcing needs & recruiting accordingly.
- Training → - developing skills in the employees & oneself.

CONTROLLING

With the company objectives in mind :-

- Setting performance standards,
- Monitoring performance,
- Measuring performance,
- Evaluating performance,
- Correcting performance or re-assessing standards.

For others & for yourself.

PLANNING

Has the organisation performed a S.W.O.T. analysis necessary to enable efficient...

- Policy making
- Forecasting
- Decision-making

- following effective problem-solving activities.
- setting long- & short-term objectives.
- in all Key Result Areas, to include.... budgeting; scheduling; progress-chasing; information feedback systems; etc.

'ROLES' IN ORGANISATIONS

* MANAGER'S ROLES
* MANAGER'S ROLE SET
* WHY CONSIDER ROLES ?

MANAGER'S ROLES
Every manager has multiple roles :-
- Assigned organisational role
- Evolved role
- Perceived role

DEFINITION :- A set of socially expected behaviours associated with a given status or position. An organisation is a system of inter-linked roles & prescribed behaviours. The ROLE exists apart from the person.

- The job the manager is working upon.
- The role to which are attached behavioural expectations.
- The manager's role as (s)he sees it.

A ROLE SET is the collection of persons with whom the manager interacts.
- WORK ROLE SET
- NON-WORK ROLE SET

At the centre of this set is the manager, the 'FOCAL PERSON'

WORK Role Set includes one's boss; subordinates; peers; customers; etc.

NON-WORK Role Set includes spouse; children; parents; etc.

CONSIDER ROLES
With a role goes :-
- Expectations
- Obligations
- Privileges

Conflicting role expectations creates stress & possible conflict for managers

ROLE EXPECTATIONS
- What others expect of you
  - Decision maker,
  - Counsellor,
  - Expert,
  - Leader,
  - Administrator,
  - Disciplinarian, etc.
- What you expect of others
  - Compliance,
  - Loyalty,
  - Reporting,
  - Trust, etc.
- Manager's self perceptions

OBLIGATIONS
- Ensure adequate, safe working conditions; etc.

* ROLE CONFLICT

MANAGERIAL ROLE CONFLICT
- The manager may occupy a number of positions simultaneously.
- Conflict arises when the manager confronts diverging expectations.
- Conflict results in ROLE STRESS

EXAMPLES
- Responsibility without authority.
- Worker being promoted to supervisor → Trying to maintain their authority while supervising friends & maintaining relationships.
- Female managers
  - Retaining their femininity (wife & mother).
  - Denying their femininity → Matching male counterparts & absorbing male traits as professional managers.

CORPORATE STRATEGIC PLANNING

* PURPOSE OF STRATEGIC PLANNING
* STRATEGIC PLANNING ELEMENTS
* ADVANTAGES OF CORPORATE STRATEGIC PLANNING

PURPOSE Includes:-
- Allocation of primary resources
- Assisting the organisation to adapt to its external environmental opportunities & threats.
- Coordinate activities to reflect the organisation's strengths & weaknesses.
- Build an organisation which learns from past strategic decisions to make improved decisions in the future.

A PRIMARY RESOURCE is any resource which can be disposed of in a discretionary manner to create value for the organisation. They may be moved from one part of an organisation to another.

ALLOCATION OF PRIMARY RESOURCES
Include :-
- Funds.
- Central management skills.
- Technological know-how
- Other resources

SECONDARY RESOURCES are less easily disposable discretionary resources (less easily moved):
- informal business contacts,
- superior locations,
- influential political contacts,
- excess production capacity,
- energy,
- specific human resources & expertise.

STRATEGIC PLANNING ELEMENTS
- Adaption
- Integration
- Learning & development

ADAPTION 'Where is the organisation to go?' An outward looking activity to improve organisation's chances to employ its resources for the best return.
- discourages extrapolation from the past to determine future activities
- high adaption levels
- low adaption levels

eg. exploit backlog of opportunities from R. & D. activities.

- We cannot avoid mental extrapolation which diminishes creative processes.

Focusses on the emerging environmental opportunities & threats.
- Sees environmental turbulence as an opportunity to change & move ahead.
- Looks for new products & markets.
- Looks for new businesses to acquire or possibilities to advance in our own business area.

LEARNING from retrospective analysis of strategic decisions to improve future str. decisions.

DEVELOPING - uses accumulated experience as a tool to develop subordinate's capabilities & facilitates the transferability of strategic skills from one manager to another.

INTEGRATION 'How to get there' The orderly evaluation of the organisation's strengths & weaknesses leading to efficiency of operation; identifying a strategic direction & programming to achieve its objectives.

- Ideally, this leads to a self-correcting corporate planning systems. (A closed loop process which monitors progress & updates plans.)

ADVANTAGES OF PLANNING
- Reduces dependency upon individual executives with possibly individualistic leadership styles.
- Helps cope with management transitions.
- However, having a plan is no guarantee of success for the organisation since it is the quality of decisions which matters.

STRATEGIC PLANNING (1)

* PLANNING IS .....
* STRATEGIC PLANNING
* FORECASTING

PLANNING IS ....

- A systematic process.
- A decision making process, which...
- Assesses the future impact of today's decisions.
- Directed to the achievement of the company's objectives.
- Planning is NOT forecasting.
- Planning does NOT eliminate risk.

STRATEGIC PLANNING is a systematic process of making current decisions & assessing their future impact on the organisation's objectives.

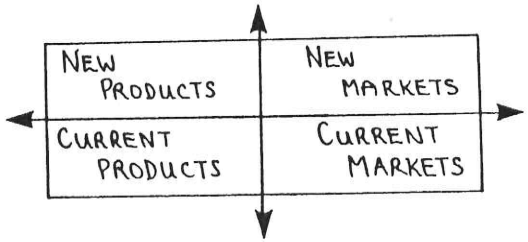
STRATEGIES ARE .....
a set of actions in support of objectives.

STRATEGIC PLANNING looks at :-

- What we have been doing.
- What we are doing now.
- What we should be doing in the future
- What we should NOT be doing in the future

It needs a reasonably accurate forecast of the future.

Technological planning to identify :-
- new markets for current & derivative products.
- new products for new & existing markets.



FORECASTING examines :-

- Future opportunities, threats & problems facing the organisation.
- What will satisfy one's customers, shareholders, employees & everyone with an interest in the company.
- Trends & preferences in political & social attitudes.

- Lack of accuracy in forecasting trends & preferences throws doubt on the worth of such activities but ANY model is better than NO model.
- Forecasts originate in the past & say nothing of the future 'per se'. We are less concerned for their accuracy than for their value to the organisation.

- Marketing opportunities should translate into technical objectives & strategies from a given technological base. The engineering manager is at the interface of current technology & assessed future technology with eyes on the planning horizon.

STRATEGIC PLANNING (2)

* PLANNING PROCESS
* 3 LEVELS OF STRATEGIC PLANNING

PLANNING PROCESS

Executives need to have an explicit focus on the TASK.

- Who should be involved.
- When matters should be dealt with.
- What/How to provide info?; interaction; communication; & decision concensus among the managers involved.

LARGE ORGAN^N^:

- CORPORATE PLANNING
- DIVISIONAL PLANNING
- FUNCTIONAL PLANNING

Smaller Companies or Single Businesses

3 LEVELS OF PLANNING

- Corporate level
- Divisional level
- Functional level

CORPORATE PLANNING (at PORTFOLIO LEVEL) considers the resource flows between different divisions of the organisation addressing:

- which division gets a net influx of resources for growth.
- which will be giving up resources to curtail growth

Corporate planning interacts downwards to divisional level.

DIVISIONAL LEVEL

Planning here considers how to improve one's competitive position by :-

- utilization of plant or eqpt.
- market exploitation, etc....

leading to a successful business strategy. This must consider...

.... the business strategy of other divisions to prevent loss of external competitive advantages by competing with other divisions.

.... the use of common facilities e.g. R&D; marketing expertise; segmentation; customer intelligence etc. to reduce overheads.

Divisional planning interacts downwards to functional level.

FUNCTIONAL LEVEL

- Reconciles strong vested interests of functional managers in functional departments. (e.g. Production; Sales; R & D; accounting; etc.)
- These are derived plans from business strategies & must support them.

BUSINESS - A 'SYSTEMS' VIEW

* FEATURES OF A 'SYSTEM'
* SYSTEM OBJECTIVES
* SYSTEM CONSTRAINTS
* SYSTEMS THINKING

FEATURES
- A collection of inter-related functional parts (sub-systems)..... separated by
- A system boundary..... from
- The environment, & possibly enclosing
- Sub-systems (S-S)
- Inputs,
- A process / activity,
- Outputs.

Working together in an organised way.

- These 'parts' do something (eg. a service; a product; etc.)
- They are affected by being part of the system & are changed if they leave it.

In an organisation they may comprise:
- energy flows,
- information flows,
- physical material flows.

- Sub-systems may exist within the major system, the smallest sub-system is an element of the whole system.
- Each S-S has its own inputs & output. The output of one S-S may be the input of another S-S.

SYSTEM OBJECTIVES
- All systems have objectives. Minimal objectives may be 'to survive'. Others could be... 'make a profit'.... 'provide a service'... etc.
- To have objectives is not necessarily to achieve them. They aid systematic planning.
- Organisational objectives may conflict with each other

eg. 'increasing output' may conflict with an objective to 'contain expenditure.'

SYSTEM CONSTRAINTS
- All systems have constraints or limitations. (In organ^ns they could be legislation; financial; environmental; one's competitors; etc.)

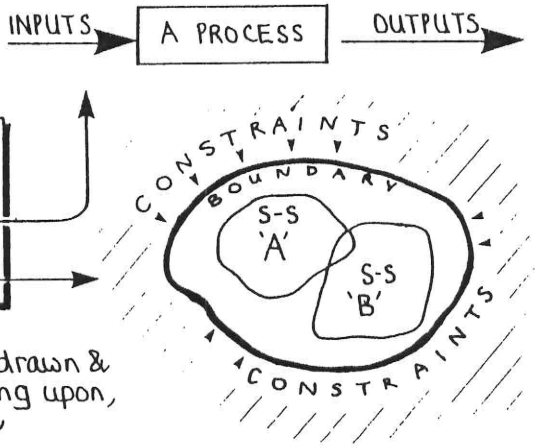
SYSTEMS THINKING (S.T.)
- Modern organ^ns & machines are complex structures
- The inter-relation of parts & sub-systems with each other & across the boundary with the environment increases this complexity.
- Many systems will exhibit common, similar patterns of behaviour & general properties.
- S.T. uses a holistic approach with a top-down (bird's eye) view of the organisation.
- S.T. helps one understand & predict BEHAVIOUR & aids design of more efficient systems.

Increasing complexity leads to specialization of function(s).

Sees a system as a whole & not just a collection of parts. It focusses attention on the environment too.

* SYSTEMS DIAGRAMS

- Show the 'order' in a system more clearly:
  - schematic block diagram shows the structure of a system
  - systems map relates the system & the environment



System boundaries are arbitrarily drawn & their location is subjective depending upon,
- the past experience of person(s),
- limits of their expertise,
- interpretation of the meaning of words,
- individual biases & prejudices. (Whether observer or operative.)

SYSTEMS THEORY WHAT USE IS IT?

(See Outline : Business, a systems view)

S - STIMULUS R - RESPONSE

* USING AN ANALOGY
* SENSITIVITY TO THE ENVIRONMENT
* REACTIONS OF SYSTEMS

ANALOGY - A comparable system model could be :-
- A biological ecosystem (food chain)
- The human body

MODELS & ANALOGIES are useful in assisting one to visualize a 'system'. However, once visualized, the imagery must not be taken too literally but must be discarded.

- Various plants & animals co-habitate in equilibrium. Ecological variances in the system cause temporary imbalances but equilibrium is soon restored.
- Individuals' bodies are complete systems with INPUTS (air, water, food) & OUTPUTS (heat, work, waste).
- Individuals have a complete, internally self-correcting, CLOSED regulatory system.
- Individuals interact with each other within social & political systems (communities).

SENSITIVITY
- Human systems have S/R systems
- Organisations have S/R systems too
- Organisation's 'sensory organs' receive feedback, & raise conscious awareness

Sensory organs & a central nervous system.

eg. Action - grips object, feedback received.
S - too hot to hold.
R - releases grip on object.

Feedback on the external environment comes from :
- market intelligence,
- from sales figures,
- customer complaints / praise,
- auditors,
- local &/or government authorities, etc.

S - Competitors in market reduce your market share.
R - Increase advertising; reduce price; etc.
Objective - to restore market share equilibrium (minimum)

REACTIONS OF SYSTEMS
- Humans - seek harmony & equilibrium to reduce sensory dissonance
- Organisations - ditto -

- Corporate objectives require equilibrium. Minimum objective is 'survival' but prefers 'growth'.
- 'Best' situation is often the ideal but organisations may have to settle for 'improvement' of their situation vis-a-vis the environment.

- Both within themselves & their social environment (yet achieving personal objectives.)

* WHAT USE IS A SYSTEMS MODEL?

- Helps an individual to view the organisation holistically.
- Understand interactions with environment → Realise how organisations are affected by the actions of other organisations (systems) in the environment (S) & why you may expect a reaction (R).
- Helps identify energy inputs → - Raw materials; human resources; money; expertise; etc.
- Helps identify 'sensory systems' → - Across or within system's boundaries, which keep it in touch with its environment & its component parts (sub-systems)
- Illustrates need for comm^n. systems
- Helps to predict behaviour (future)
- Other uses.

MODELLING AN EFFECTIVE ORGANISATION

* ORGANISATIONAL VARIABLES TO BE CONSIDERED
* PROBLEMS OF ORGANISATIONAL VARIABLES
* OTHER VARIABLES

ORGANISATION VARIABLES

A pre-requisite of an organisation variable is that it must be measurable.

- Productivity
- Morale
- Conformity
- Adaptiveness
- Institutionalization
- Stability

PRODUCTIVITY ratio OUTPUT & is related to INPUTS efficiency. Inputs - money; materials; machinery; etc Outputs - goods or services - all may be quantified.

MORALE To what degree are indiv'l needs satisfied? Measured in terms of attitudes & perceptions of gp. members. Difficult to relate to indiv'ls due to their varied need strengths & perceptions of the fittingness of their rewards.

CONFORMITY refers to lack of deviation from orgn's normative goals For this, employees must accept and adhere to orgn's ideology. (Clearly stated & unambiguous eg. quality standards; customer satisfact^n; zero defects; etc

ADAPTIVENESS How quickly does the organisation adapt to changing environmental circumstances? This need varies between organisations depending on the market requirements. Many measures could be used.

STABILITY is a measure of the unity of purpose; lack of turbulence; good employee relations; etc. within the organisation.

INSTITUTIONALIZATION relates to the positive attitudes of non-members to the organisation eg. customer loyalty; union attitude; etc. Also to the degree of support an organisation receives from its environment.

PROBLEMS OF O.V.'s

- Do you treat them individually?
- Should you add them together to get an effectiveness index?
- Are they equally weighted?
- How valid is the model you make?

OTHER VARIABLES

Organisations do not exist separated from :-

- Individuals
- Groups

How effective are they? Effective organisation is built on effective individuals working in effective groups.

GROUP EFFECTIVENESS may be measured as for productivity.

INDIVIDUAL EFFECTIVENESS

- According to the individual's role in the organisation, effectiveness could be a measure of productivity or 'personal output' in observable behaviour. Other measures could be 'conformity'.
- Individuals cannot be considered outside of their social context - the group.

* FACTORS MAKING THE MODEL MORE COMPLEX

- What size are the groups?
- What are the task demands?
- What environmental factors?
- What communication patterns?
- What leadership styles?
- The dynamic nature of organ^n, whose feedback loops allow for continuous re-appraisal & self-corrective actions.

Every organisation is unique, yet a scientific evaluation is possible. First you need a model of the organisation. The model needs flexibility, which makes evaluation more difficult. Its use is to make better predictions & produce more effective organisational behaviour.

DESIGNING ORGANISATIONS 1

* FEATURES OF AN ORGANISATION
* DIVISIONS OF ORGANISATIONAL TASKS

FEATURES OF AN ORGANISATION

- Division of labour into distinct tasks.
- The coordination of these tasks

-As the work & the organisation become more complex, coordination methods alter from :-
  - mutual adjustment (simple orgⁿˢ)
  - standardization (complex orgⁿˢ)

(See 'Designing Orgⁿˢ 2')

The essence of modern management of organisations is DESIGN. 'Design' assumes discretion to, & the ability to, alter systems. Understanding design & systems enables managers to influence the division of labour & the coordinating mechanisms for the good of the organisation.

DIVISION OF TASKS

The 5 main divisions in an expanding/vital organisation are :-

- Senior management apex
- Middle management
- Operating core
- Technostructure
- Staff support structure

SENIOR MANAGEMENT APEX

- Mediates between the organisation & its environment.
- Develops patterns of organisational decisions at a pace which will not damage the organisation or its environmen
- Has a wide, abstract perspective of the organisations.
- Its tasks have minimum repitition & standardization, considerable discretion & long decision-making cycles.
- Responsibilities
  - Strategic mgt. decisions.
  - Resource allocation.
  - Resolving conflict.
  - Designing & staffing the organisation.
  - Motivating & rewarding employees.

STAFF SUPPORT STRUCTURE

- Not preoccupied with analysis & standardization.
- Provides indirect services to the organisation itself varying from canteen, P.R., to legal services.
- Services are provided to all levels of the organisation.

MIDDLE MANAGEMENT

- Ranges from senior management to 1st line supervisors.
- Embodies the coordinating mechanisms of 'direct supervision'.
- Scalar (vertical line) structure with formal authority.
- Job orientation varies from more abstract (top levels) to more detailed & work focussed (lowest levels).

TECHNOSTRUCTURE

- As organisations grow & become more complex, standardization can reduce the need for much direct supervision.
- Its role is to analyse work & procedures & effect certain forms of standardization within the organisation.

OPERATING CORE

- The heart of any organisation - it actually produces the goods or performs the service.
- Responsible for
  - securing inputs,
  - transforming inputs to outputs,
  - distributing outputs,
  - supporting the 'process'.

«Issue 1

DESIGNING ORGANISATIONS 2

* WHY FORMALIZE BEHAVIOUR ?
* ACHIEVING FORMALIZED BEHAVIOUR
* ASPECTS OF CO-ORDINATING ACTIVITY / TASKS

WHY FORMALIZE BEHAVIOUR ?

It is by the behaviour of people that tasks are completed. So:-

- to regulate behaviour. → -to reduce its variability, -to predict & control it.
- to assist the coordination of tasks
- to improve productivity & performance through repetition.
- to satisfy a desire for orderliness usually the norm of bureaucracies → -bureaucracies generally prefer predetermined & predictable behaviour. (See Outline 1·36)

ACHIEVING F.B.

- By attaching specifications to the position holder → i.e. a Job description
- By standardising work flows & attaching specifications to the work.
- By establishing rules & regulations for general issue.

In these ways behaviour is regulated.

ASPECTS OF COORDINATION

For tasks from lowest to highest complexity :-

- Mutual adjustment through simple informal communication.
- Direct supervision - 1 person takes responsibility for the work of others.
- Work process standardisation → - Workers told WHAT to do eg. simple assembly tasks
- Output standardisation → Product or performance is specified, not how to do it.
- Skills & knowledge standard^{n} → - No methods or outputs specified. Only the skills or knowledge required of the job holder.

Last 3 are the domain of the technostructure.

* TECHNOSTRUCTURE'S ROLE

Analysis of work :-

- At lowest level they standardise work processes at manufacturing level by production control; quality control; etc.
- At middle levels they standardise outputs of intellectual work of the organ^{n} eg. training; Research & Development; etc.
- At highest levels (apex) they design strategic planning systems; financial systems; etc.

(A mix of the coordinating systems is possible.)

IMPLICATIONS OF I.T. FOR ORGANISATIONS

(I.T. - Information Technology)

* INFLUENCE OF I.T. & COMPUTERS
* ORGANISATIONAL IMPACT OF I.T.
* FUTURE MANAGERIAL ISSUES

INFLUENCE OF I.T. etc.

- Initially, introduced to improve efficiency & not to produce organisational change
- Socially - power in organ^n moves from those in wealth-creating activities to those who understand & develop info^n systems.

→ Limited technological & economic objectives eg.

- Improved customer service,
- Quicker sales analyses,
- Better stock control; prod^n control; inspection processes, etc.
- Replaced decision-making by employees at lower levels in the organisation.

Basically involved 'info^n workers' making routine info^n entries & 'knowledge workers' who analysed & used the information.

- Line managers sometimes feel alienated. Some acquire micro-computers for personal, independent data processing.

ORGANISATIONAL IMPACT....

depends on where & how it is used. More easily accepted when :-

- Employees share similar organ'l isational goals & values.
- Management style is democratic or paternalistic
- Management distance is small between mgt. & employees.
- The chosen approach & intro'n of I.T. is participative.
- The power/ability of the unions to consider change is on an equitable & consensual basis.

It must be organisation specific & depends on how commited the organisation is to technological & organisational change.

→ - Authoritarian style militates against shared goals.

FUTURE MANAGERIAL ISSUES

- Planning challenge
- Organisational challenge
- Control challenge
- 'Behavioural' challenge

- Management of creativity & innovation in micro-electronics.
- Strategic opportunities of IT. applications → eg.
  - as a competitive weapon
  - as a productivity tool
  - to deliver new services.

Corporate strategy is incomplete without its I.T. component.

- Management dev't; user awareness.
- Org^n dev't to cope with new I.T.'s

- Distribution of info^n processing ability (& therefore power).

- To minimise negative effects in terms of attitude & behaviour in employees at lower levels.

∝ Issue 1

IMPLEMENTING COMPUTERISED SYSTEMS

* PREPARATION FOR IMPEMENTATION
* STRATEGIES FOR IMPLEMENTATION

PREPARATION

Represents the longest phase.

- Design a new system
- Write the program
- Test the program

A specialist job for programmer

Long consultation is required between those who know the present system & analysts & programmers to devise a new system which will:

- be user-friendly (screen layout is important),
- be more efficient than present system,
- cope with present demands, & ....
  - more to be added,
  - has sufficient storage for foreseeable future,
  - fast & effective interrogation for control data.

PARALLEL, PHASED & PILOT strategies are compatible & could sometimes be combined without ill effects.

STRATEGIES

- Direct changeover
- Parallel run
- Pilot scheme
- Phased implementation

PARALLEL RUN

Old & computerised systems run simultaneously in parallel.

PROBLEMS :- work is duplicated to keep 2 systems primed & running. Extra space may be necessary to accommodate both systems. Commitment to new system is delayed.

Advantages :- faults in the new system can be identified & corrected.

Parallel working should be for a limited time only

PILOT SCHEME

A small scale trial with a part of the organisation or data. Chance to identify & correct faults. Interface problems occur between old & new systems while new system lacks access to ALL the data. Pilot scheme will not disrupt the overall workings of the organisation.

DIRECT CHANGEOVER

Old system stops / new system takes-over 'overnight'.

PROBLEMS May be difficult to input all data from old to new system 'overnight'; checking the accuracy of the new file just created is difficult; what if faults develop after 2-3 weeks ? No going back!!

High levels of confidence needed in the new system.

(Some data could be transferred prior to changeover but a major task needs to be performed on THE day.)

PHASED IMPLEMENTATION

Step-by-step approach as new system is eased in. Phases must be logically sequenced so computer takes over more & more work functions until working 100%.

FEATURES OF FUTURE ELECTRONIC OFFICE WORK 1

* TECHNOLOGICAL FEATURES
* ECONOMIC FEATURES
* POLITICAL FEATURES

TECHNOLOGICAL FEATURES

- Reduction in costs
- Reduction in physical size; also quieter & faster.
- Improvements in quality
- Improvements in compatibility.
- Developments in tele-communications

(Problems of equipment standardisation are still unresolved & likely to remain so.)

- May lead to uncontrolled procurement of incompatible equipment without reference to company objectives & policies.
- Makes them more flexible & adaptable.
- More versatile & reliable.
- Voice input will become commonplace.
- Greater ease of operation.

Example :-
- date & time transmission.
- software languages.
- etc.

Leading to opportunities to work from home.
Conferencing facilities using tele-; voice ; video & computer links.

ECONOMIC FEATURES

- Re-appraisal of investment policies caused by commercial competition between suppliers.
- Desire to speed up & improve the quality of service offered.
- Salary costs rising in relation to equipment costs
- Cost saving

- Fewer staff offering higher productivity have obvious attractions.
- Floor space reduced for new equipment (filing systems) compared with old.
- Employees are productive, files are mostly non-productive.
- Lower maintenance costs for electronic machines - fewer moving parts & greater reliability.

POLITICAL FEATURES

- Rate of change may be influenced by government policies.
- Support for Information Technology is increasing & developing
- Involvement of Trade Unions in planning & implementing change
- Government funding for technological developments on a large scale, or modernisation grants.

- Introduction of new technology in schools reduces the need for the familiarisation of new, young employees.
- Increased acceptance of new technology.
- Widespread acceptance & use of keyboard skills.

- No corporate planning is complete if it does not consider aspects & influence of I.T.

FEATURES OF FUTURE ELECTRONIC OFFICE WORK 2

* SOCIAL FEATURES
* ORGANISATIONAL FEATURES
* SECURITY FEATURES

SOCIAL FEATURES

- Reduction in manual work loads.
- Widening of responsibility & skills. → Through job enrichment & enlargement.
- New (unknown) jobs will be created.
- The 'quality of life' will be influenced → Through:
  - Shorter hours.
  - Cleaner work.
  - More pleasant working conditions,
  - Home-based work
  - More challenging work.
- Jobs & career opportunities will alter for managers, supervisors, secretaries & lower-level operatives.

ORGANISATIONAL FEATURES

Two aspects may be considered:-

- Communications → - Value lies in info.ⁿ & the part it plays in the production of goods & services → There will still be a requirement for:-
  - letters & telex,
  - telephone calls & cables,
  - orders & invoices,
  - reports & contracts,
  - etc.

  (These may well increase but their manner of processing may alter significantly.)
- Changes in organisation

CHANGES IN ORGANISATION

- Impact on organisational design → certain functions centralised, others de-centralised.
- New skills & responsibilities cut across traditional jobs & departmental boundaries. → new training initiatives necessary.
- Resource allocation may need to be modified.
- New systems may be needed & existing systems redesigned → eg. overall policy towards office systems & personnel.
- Rapid access to information is required. → This feature deserves recognition as an organisational resource to compare with land, labour, plant or capital.
- Easier monitoring & supervising of office work is possible. Outputs (as keystrokes) easily assessed. → Permits increased management control.
- Re-organisation of work → New groupings of workers may result:-
  - teams,
  - semi-autonomous work groups,
  - participative problem solving groups,
  - etc.

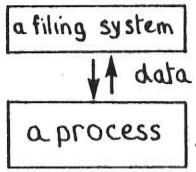
SECURITY FEATURES

Paper-less offices have authorisation & authentication problems which could throw doubt on the origin of messages. & the legality of instructions. Ways to overcome this are being explored.

SUMMARY To look at cost minimisation rather than opportunity maximisation is one attitude which must alter if the future of the electronic office is to be realised fully. To apply new technology to old problems only is to leave many opportunities untouched.

CHANGING TO THE ELECTRONIC OFFICE

- ✳ THE BASIC OFFICE SYSTEM
- ✳ WHAT WILL GO ON ?
- ✳ NEW DATA INPUT DEVICES
- ✳ WHY THESE CHANGES OCCUR



- Office INPUTS & OUTPUTS are traditionally information (data) and paper-based.
- Filing System is traditionally paper-based.
- Often labour intensive for :-
  - checking accuracy,
  - recording & duplicating,
  - filing & retrieval of info^n,
  - typing,
  - mailing, etc.

WHAT WILL GO ON ?

- Process - as before
- Apparatus - some will still be familiar
- New apparatus

- But probably quieter, faster, more efficiently, less paper-based.
- Many will be automated reducing repetitive & boring tasks.

DATA INPUT DEVICES

As well as the conventional keyboard we will have :-

- Voice (recognition) systems.
- From another computer.
- From another electronic device
- From peripheral devices

- Keyboards still used but type appears on VDU screen & not paper.
- Reprographic systems will gradually improve.
- Storage of paper is reduced considerably.

- For capture, reproduction, storage & retrieval of data &/or text.
- Majority of persons become <u>USERS</u> of hard-ware & soft-ware <u>WITHOUT</u> the need to understand or write programs. Familiarisation comes quickly (with usage) & skills develop.
- New data input devices used.

- Punched card readers.
- Punched tape readers.
- Disc storage devices.
- Cassetted storage devices

} using magnetic tape

e.g. photo-electric cells, thermocouples, light sensors, etc.

WHY THESE CHANGES OCCUR

- Advances in computer technology
- Advances in communication technology
- Growth in use & quality of word-processing machines
- Improving variety & quality of reprography
- Cost saving

- Much smaller (compact), some portable.
- Better (larger) information storage capabilities.
- High reliability factors.
- Falling cost of manufacture & installation.
- Wider variety of programmed activities.

- Locally high perf^ce information networks (via cable links).
- Intra-nationally - better telephone links.
- Inter-nationally - better links by land-lines & satellites.
- Viewdata, Prestel, etc. broadcast systems with large data libraries & open access through T.V. & telephone links.

- Easy to amend & correct text. (& auto. spell check)
- Easy to store & retrieve documents.
- Variety of print modes & faces.

- Linked with reduction of paper storage & facsimile transmission (i.e. documents through the telephone) via electronic mail.

SUPERVISING CHANGE TO AN ELECTRONIC OFFICE

* MAIN FEARS
* OVERCOMING THE FEARS
* MOVING WITH CAUTION
* FACING REALITY

MAIN FEARS
- Older workers disadvantaged
- Loss of status (respect) following reorganisation
- Unwilling / unable to learn new skills

- May learn more slowly.
- Fear of other shortcomings being exposed.
- Fear for promotion prospects.
- Fear of unknown.
- Fear of job impoverishment.
- Loss of subordinate assistance (technical, secretarial, back-up)
- Loss of control – resulting from lack of knowledge of eqpt. & procedures.
- Fear of job loss, especially by older staff.
- Learning 'typing skills' is considered demeaning.
- Evidence suggests that new (different) jobs are created.

OVERCOMING FEARS – by confronting them.
- Adopt a positive approach, accept & welcome change
- Move to forefront in training activities
- Look for new 'status' areas to enter.

- Be enthusiastic, it is infectious.
- Seek out the reasons for it.
- Be able to explain it to others.
- Identify & sell the benefits.
- Others will may turn to you for help.
- It will enhance your status & gain you respect.

MOVE WITH CAUTION
- Beware over-selling benefits initially
- Run 'old' & 'new' systems while familiarization proceeds
- Don't neglect the consultation & training processes with staff / subordinates.

- Anticipate 'dislocation & chaos' of normal office activities during changeover.
- Timetable the phase-in/phase-out process.
- Add extra time for contingency problems.
- Benefits may be slow in coming to staff &/or customers..
- Keep in contact with 2-way communication;- possibly through regular meetings with staff.
- 'Walk the Job' – get out and talk to staff at their workplace.
- IMPART – progress in the planning of change; the next moves; new work practices; the benefits to date; productivity figures; etc.
- RECEIVE – feedback & suggestions; complaints & grievances.

FACING REALITY If there is the certainty of staff redundancy in the long term, face reality honestly & early.
- Liaison between management & unions is necessary.
- Identify areas in greatest risk.
- Prepare staff with information rather than rumour
- Assist staff to plan ahead

- A communication vacuum is quickly filled by rumour ⇒ possibly unwarranted fears & speculation.
- Retrain or redeploy if possible.
- Examine early retirement; redundancy schemes; etc.
- Constructively assist staff with time off; interview training; filling application forms; self-marketing; etc.

Issue 1

ELECTRONIC OFFICE - FACTORS INCREASING MOTIVATION

* JOB ENLARGEMENT
* JOB ENRICHMENT
* TEAM WORKING

JOB ENLARGEMENT

Characterised by :-

- Increasingly interesting work.
- Increased interest in work.
- Increased accuracy of working.
- New jobs & responsibilities.

Leads to an increased familiarity with a wider range of systems & applications.

DEFINITION :- expansion of the job from a central task to include additional related tasks of a similar type.

- Make available a wider range of services.
- Reduce possibility of de-skilling through new technology

Traditional typing skills required good copy-first-off & layout & spelling were stressed. Word processing could use standard layouts, auto-spell checks, etc.

JOB ENRICHMENT

Characterised by:-

- Accepting responsibility for planning, control & performance.
- Increased involvement in problem-solving performance.
- More accurate, easily operated apparatus leading to increased Job Satisfaction.
- Combining jobs leading to more demanding jobs, fewer repetitive tasks & more whole jobs. Possibly more customer contact too.

TEAM WORKING

- Focus on the task of the total work group.
- Set team objectives for whole tasks - gives more group problem-solving activities & more rapid feedback on progress.
- Encourage development of multiple skills by work rotation within the group or team.

* SEMI-AUTONOMOUS WORK GROUPS

- New or existing work group is given greater responsibility & control over its own work.
- Possibility of eliminating supervisors in favour of group leaders.
- Offers increased access to technical & other advice.

- Planning work rotas - scheduling breaks & work patterns.
- Evaluating performance against work standards.
- Self disciplining, leading to greater efficiency.

* AWARENESS

When the need for change is perceived, structure an approach.

FEEDBACK

- Establish objectives ← budgets; time-scales etc.
- Diagnose & identify problems ← consider personnel policies (training & rewards) social & psychological needs; comm^n. & info^n. systems.
- Plan change ← Design new system, hard-ware & software.
- Prepare for change ← Small scale pilot scheme? Large scale implementation?
- Implement change ← Structural alterations? Timetable activities & training
- Monitor & evaluate change ← Dual systems? Phase-in/phase out?

HEALTH & SAFETY IN THE 'ELECTRONIC OFFICE'

* SAFETY OF APPARATUS
* WORKER'S PERSONAL CONSIDERATIONS
* APPLIED ERGONOMICS

SAFETY OF APPARATUS

Majority of working apparatus is electrical so consider power cables & supplies & ensure :-

- Apparatus within easy reach of power outlets (points)
- Cables are clear of furniture & passing feet
- Apparatus is kept clean & dry.

IDEALLY - cables should be ducted or out of sight where they cannot be trodden on or snagged

PERSONAL CONSIDERATIONS

- Stress & strains
- Rest & refreshment
- V.D.U.'s & eyestrain

STRESS & STRAINS often come from adopting a fixed posture for long periods.

- Arm & neck strain, reduced if keyboards are correctly sited within easy reach & not too high. Preferably lower than desk level.
- Neck & eye strain, reduced if document holders are used adjacent to V.D.U. & equidistant from eye to V.D.U. (No need to alter eye focus.)

REST & REFRESHMENT permitted periodically away from the work station.

- Gives some exercise & change of position.
- Avoids spilling beverages onto/into machinery.

V.D.U.'s & EYESTRAIN Upto 1983, no positive link ⊛ established between the two. Consider ambient light (type & intensity) & concerning the screen :-

- Character size & spacing,
- Character definition & brightness,
- Use of lower- and upper-case letters,
- Use of matt screens to reduce reflections & glare.

⊛ Nothing to contrary either

N.B. Eyesight often deteriorates with age (40-50 yrs) & also alters during early years (18-25 yrs). There is no reason why these natural phenomena need be blamed upon VDU watching. Headaches may have multiple causes.

APPLIED ERGONOMICS

Relates people & their working conditions.

- Adequate 'personal' space
- Furniture & furnishings
- Ambient light levels optimum.
- Floor coverings
- Atmospheric conditions
- Ambient noise

Enough for operating the machinery safely but should also consider the need for 'privacy' & yet have opportunity to interact.

- Proper access to desks to reduce 'stretching out'.
- Chairs with backrests & adjustable for height; without armrests; enough knee space
- Desks allowing ample knee knee space; room to lay out papers; easy access to drawers & split-level to take keyboard.

Footrests for shorter persons so feet rest on something, reducing pressure behind knees.

- Noise does distract workers, fans, printers & machinery can raise noise levels & lower the efficiency of operators.

- Floor coverings to reduce noise, slipping & dust/dirt levels.

- Many large computer installations require air conditioning. This sometimes needs supplementing with ionisers. The humidity levels will adversely affect operators if too high or too low.

OFFICE DECOR & CLEANING

- Soft, pale colours are usually preferred with matt finishes to reduce glare.
- Static electricity build-up encourages dust to settle.
- Light fittings & screen get dusty & efficiency/intensity diminishes.
- Instruct cleaners what may/may not be switched off and/or moved.

CHALLENGING THE 'PRODUCT-LIFE-CYCLE' CONCEPT (P.L.C.)

✳ P.L.C. CONCEPT ASSERTION

✳ CHALLENGING EVIDENCE

✳ WHAT THE EVIDENCE SUGGESTS

PRODUCT LIFE CYCLE asserts all brands follow a life cycle to inevitable 'death'.
- Introduction.
- Growth.
- Maturity.
- Death.

The challenge lies in avoiding market fragmentation & building up a few key brands through intelligent marketing support following strategic research with marketing & communication models.

CHALLENGING EVIDENCE
- Many brands can gain 'second lives' thanks to intelligent promotion.
- Many brands/product classes enjoy a long maturity stage
- Many product classes appear impervious to normal P.L.C. pressures provided they satisfy basic consumer needs

EXAMPLES
- Scotch Whiskey – a life span of centuries.
- Cough remedies } lasting decades
- Soft drinks }

Product 'forms' are often less stable than product 'classes' & may exhibit P.L.C. patterns.

THE EVIDENCE SUGGESTS
- The 4 major phases of P.L.C. are not clear cut compartments.
- One cannot judge accurately in which phase of P.L.C. the product form finds itself.
- P.L.C. is a dependent variable which is determined by marketing actions.
- P.L.C. as a concept is more likely misleading than useful

A company may not extend the maturity phase indefinitely due to changing consumer tastes, values & preferences.

✳ RESULTS OF MANAGEMENT ERRORS

- P.L.C. becomes a self-fulfilling prophecy as management moves funds from promotion to R.& D. on new products.
- New product introduction is over-emphasised.....

yet new products take....
- more time,
- more money,
- give more anguish,
- involve more pitfalls,

& - get more attention.

.....yet today's products are nearest the cash register.

Conclusion The P.L.C. concept has little validity. By judicious use of advertising & marketing, through well conceived & carefully directed marketing communication, the company may consider developing different variations of their product class & not waste monies spent building goodwill for their brand over the years.

BUILDING MARKETING EXPERTISE

* WHY BUILD UP EXPERTISE ?
* COMPANIES WITH EXPERTISE.....
* BUILDING MARKETING EXPERTISE

BUILD EXPERTISE because:-
- of changes in the dynamics of competition from selling to marketing.
- declining growth rates means the battle for market share is intensifying.
- of a growing understanding that advertising ≠ marketing

COMPANIES WITH EXPERTISE
- Take an integrated approach to planning with all elements of the marketing mix in a sound business plan.
- Look further ahead (3-5 yrs) to build a sustainable market position with the consumer.
- Marketing dominates their corporate culture
- Most effective organisations are consumer oriented

Market share leaders can achieve superiority by emphasising :
- dealer service,
- product performance,
- sales coverage & skills,....

rather than advertising expenditure.

Along with an entrepreneurial spirit.

Consumer habits, practices & attitudes are well understood & constantly monitored.

BUILDING MARKETING EXPERTISE
- The change to marketing orientation could take > 3 years to develop
- Top management must lead the change, fostering innovation, encouraging risk-taking & tolerating failures.
- Outside talent may be required to develop initially
- Use market research
- Introduce product management & product-line planning
- Push profit responsibility downwards to encourage entrepreneurship.
- Develop effective annual marketing plans with built-in periodic reviews.

Needs integrated planning &
- a long-term outlook,
- an effective marketing system,
- a corporate marketing culture to develop,
- a focus on the consumer.

Needs :
- a clear sense of direction,
- a strategy for key brands,
- to target consumer groups,
- agreed objectives for advertising & promotions,
- an explicit pricing policy.

....for an intimate knowledge of the target consumers:
- identity,
- location,
- buying power
- wants & needs,
- attitude to your product &/or your company,
- etc.

THE DISTRIBUTION AUDIT (D.A.)(1)

* WHY HAVE A DISTRIBUTION AUDIT
* MAJOR COMPONENTS OF AN AUDIT
* THE COMPETITOR AUDIT
* THE CONSUMER SERVICE AUDIT

WHY HAVE AN AUDIT ?
- It is the appraisal of the existing situation - both the external environment & the internal operating environment of the company.
- It provides the relevant info. for a distribution plan.

THE DISTRIBUTION AUDIT :- is a key activity in the distribution planning & control cycle. It should be a continuous monitoring procedure. The results must be incorporated into the management decision making process.

MAJOR COMPONENTS OF AN AUDIT
- The competitor audit.
- The consumer service audit.
- The channel audit. → See D.A. (2)
- Physical distribution audit. → See D.A. (2)

THE COMPETITOR AUDIT
Establishes the quality of the competitors' distribution service. by studying :-
- the speed of delivery,
- consistency of the delivery service,
- level of availability on a regular basis

Benefits of the competitor audit →

Considers :-
- Market/segment share.
- Pricing/discount policies.
- Promotion policies.
- Product range.

BENEFITS
- Identifies opportunities that lack of competition may offer.
- Avoids designing systems to counter non-existent competition.

THE CONSUMER SERVICE AUDIT
Needs to know :-
- Where customers are located.
- Where potential customers are.
- What service levels customers require.
- What product range they need.
- Suitability of packaging to move the product.

→ Helps determine the choice/type/location of distribution points needed to satisfy customer needs & compete effectively.

THE DISTRIBUTION AUDIT (D.A.) (2)

* MAJOR COMPONENTS OF AN AUDIT
* THE CHANNEL AUDIT
* PHYSICAL DISTRIBUTION AUDIT

MAJOR COMPONENTS OF A DISTRIBUTION AUDIT
- The competitor audit. → See D.A.(1)
- The consumer service audit → See D.A.(1)
- The channel audit.
- The physical distribution audit.

THE CHANNEL AUDIT
Is the course taken in the transfer of title to a commodity. Channel decisions include :-
- A choice of intermediary.
- A consideration of the physical distribution implications of alternative intermediaries.
- The margins made available.

WHY A CHANNEL AUDIT ?
To ascertain :-
- Congruence of supplier's, distributor's & consumer's objectives.
- A profile of behavioural factors between channel members.
- Any need to alter..... ...producer's objectives, or the control factors.

THE PHYSICAL DISTRIBUTION AUDIT The 4 main components are :-
- Own company profile
- The market profile
- Physical distribution developments
- Current system capabilities

OWN COMPANY PROFILE
- Product profits.
- Packaging trends. (See Outlines 1.13 → 1.18)
- Handling costs.
- Customer service with current costs. → - Availability, - Delivery, - Delivery reliability, - Order processing, - Picking errors, - Returned goods.

MARKET PROFILE quantifies current & potential demand by determining :
- Who are the customers ?
- How much do they buy ?
- How much might they buy ?
- What physical distribution service is required ?
- Where are they located & where would deliveries be made ?

CURRENT SYSTEM CAPABILITIES
- To appraise the cost effectiveness of the entire system by considering basic aspects of :-
  - costs, &
  - throughputs.

PHYSICAL DISTRIBUTION
- Technology → - Transportation, - Warehousing/handling, - Order processing/processing, - Communications, - Unitisation.
- Philosophy, should we consider....
  - out of hours delivery,
  - new vehicle sizes,
  - EEC/overseas regulations.

MARKETING - CUSTOMER v COMPETITOR ORIENTATION

* CUSTOMER ORIENTATION
* COMPETITOR ORIENTATION
* SITUATION ANALYSIS

CUSTOMER ORIENTATION means meeting customer needs. The marketing strategy aims at :-
- Learning what the potential customer wants.
- Identifying what features they value in what they want.
- Designing offerings to embody these.
- Informing customers that what they want is available.

CUSTOMER ORIENTATION analyses the organisation's entire geographic market as one unit.
COMPETITOR ORIENTATION focusses on conditions in individual (local) markets.
The 2 orientations may lead to dissimilar programmes of marketing but are **NOT** incompatible approaches.

PRESUPPOSES :-
- Customers know what they want.
- Marketing research can find this out.
- Satisfied customers will make repeat purchases.
- Your product is sufficiently different from competitors to be important to customers.

- Long-run profits accrue.
- Company/organisation objectives realised.

COMPETITOR ORIENT'N
Examine your own & competitor's position to determine vulnerabilities.....
- Where customers may be taken from rivals → Capitalize on their weaknesses.
- Where own vulnerabilities are not capable of being exploited similarly.
- Such vulnerabilities may be temporary or enduring & include..

..... complaints about quality, price, design, service, etc.
- Retailer dis-satisfaction with delivery; handling; returns; profit margins; etc.
- Fiscal weakness like cashflow problems; interest charges; etc.
- Supplier related weaknesses eg. poor, irregular deliveries; shortages; etc.
- Other weaknesses eg. outmoded technology; poor raw materials; labour problems; etc.

SITUATION ANALYSIS
- Customer orientation implies a battle for the ultimate customer patronage.
- Competitor orientation implies a battle for several prizes in a zero-sum context

Where the market is not growing, market share is gained from, or lost to, rivals.

From whom (which company) are we winning or losing customers ?
- In which markets are we gaining/losing customers ?
- Why are we gaining/losing customers ?
- Why are they gaining/losing customers ?
- What could we do to increase/reduce these trends ?

- What are the vulnerability indicators ?
- Where may we be vulnerable ?
- How may we protect ourselves ?

(Vulnerability is a symptom of future loss of business. Vulnerabilities may be identified but exploitation may not be possible due to costs, risk & the long-term nature of benefits which may flow.)

* STRATEGIES IN COMPETITOR ORIENTATION BATTLES

Can we keep competitor's new products off the market ? We can interfere with test marketing by :-
- Excessive couponing or promotion activities.
- Monopolize shelf space by brand style, size, proliferation.
- Reinforce advertising, focussing on trivial areas where we excell.
- Play down differences between products.

∝ Issue 1

ADVERTISING 3 - EVALUATING

- ✳ WHY BOTHER TO EVALUATE ?
- ✳ WHEN TO EVALUATE
- ✳ CAMPAIGN EVALUATION - AN IDEAL

What do we want Advertising to do ? See Outlines 2·32/·33

Advertising is worthwhile if, without it, the company would be worse off - selling less of its products & making less profit.

WHY BOTHER ?

- There will be a need to defend the advertising budget & support for the brand.
- Lower marketing spends ► lower sales volumes ► product abandoned
- More effective advertising may bring down price to consumer if sales increase.
- Future choice of advertising media & scheduling is more purposeful

- 'Product Life Cycle' may become a self-fulfilling prophecy.

Too often dominated by:
- tradition,
- rule of thumb,
- fashion, etc.

WHEN TO EVALUATE ?

- Pre-campaign - based on historical data - to get the strategy right & develop the best advertising.
- After campaign has started - to improve spending & make decisions on continuing or modifying.

CAMPAIGN EVALUATION

The IDEAL is rarely reached for reasons of cost; time; data availability etc. The 5 stages are:-

- Agreeing a strategy for the campaign
- Planning the evaluation
- Advertising & data collection
- Carrying out the evaluation
- Using the evaluation

- A good campaign starts with the product analysis; defines the target; identifies Unique Selling Points; lists media choice criteria & forecasts the effect.

- Begins while the media plan takes shape. Will....
- Use 2 data sources
  - sales change (quantitative data).
  - consumer behaviour - why they acted as they did (qualitative data).
- May use modelling; common sense; data inspection; etc.

- Uses continuous data input & monitoring from the campaign
- Trends should be identified & plotted.
- Predetermined times / dates should be established for data collection.

- Fitting the data to the model (dynamic; short-term).
- Relating sales to advertising; price; etc. in a quantified way.
- Looking for the intuitively obvious. 'If you can't see it, it isn't there !!'

Distinguishing strategy from execution.
- How should the remainder of the budget be allocated ?
- Which media should be stressed & which terminated ?
- Should the content of the advertisement be modified ?
- Does the timing of the advertising need adjustment ?
- Project these short term estimates & try to quantify long term effects.
- Were our advertising objectives the right ones ?

- Advertising effectiveness does decay.

Evaluation of faulty advertising is as valuable as evaluating successful advertising.

Issue 1

WATCHING YOUR COMPETITORS

* WHAT ARE YOU SEEKING ?
* COMPETITOR SURVEILLANCE
* IMITATION STRATEGIES

SEEK TO ANSWER QUESTIONS

- What are their technological strengths & weaknesses ?
- How do they rate as a threat to you ?
- How does the market place see them ?
- How successful are they ?
- How good is their product ?
- What lessons are there for you to follow ?
- What is their technological strategy ?
- Are you ahead or behind ?
- What should your organisation be doing now ?
- Where should your organisation be going ?

We assume that outright industrial espionage at the lowest levels is not being practised.

COMPETITOR SURVEILLANCE

- Competitors are an influential force in a commercial organisation's development.
- Careful surveillance of Marketing & Engineering activities yields abundant useful intelligence
- Other sources of intelligence

What then are the strategic implications for your organisation ?

By :
- Studying Advertising & Marketing practices.
- Calculating & monitoring market share.
- Studying sales brochures & equipment specifications.
- Attending demonstrations.
- Hearing trade gossip at exhibitions.
- Studying advertising trends & location in the market.

ALSO

Talk to suppliers who also service your competitors.
Purchase, dis-assemble & evaluate competitor's product.
Study their articles in technical publications.
Examine pack sizes & packaging innovations.

IMITATION STRATEGIES

Information gathering goes on by overt & covert methods so.....

- Someone else carries the R&D costs on new/modified products.
- Enabling a competitor to leapfrog the innovator.
- Reduces own Research times.

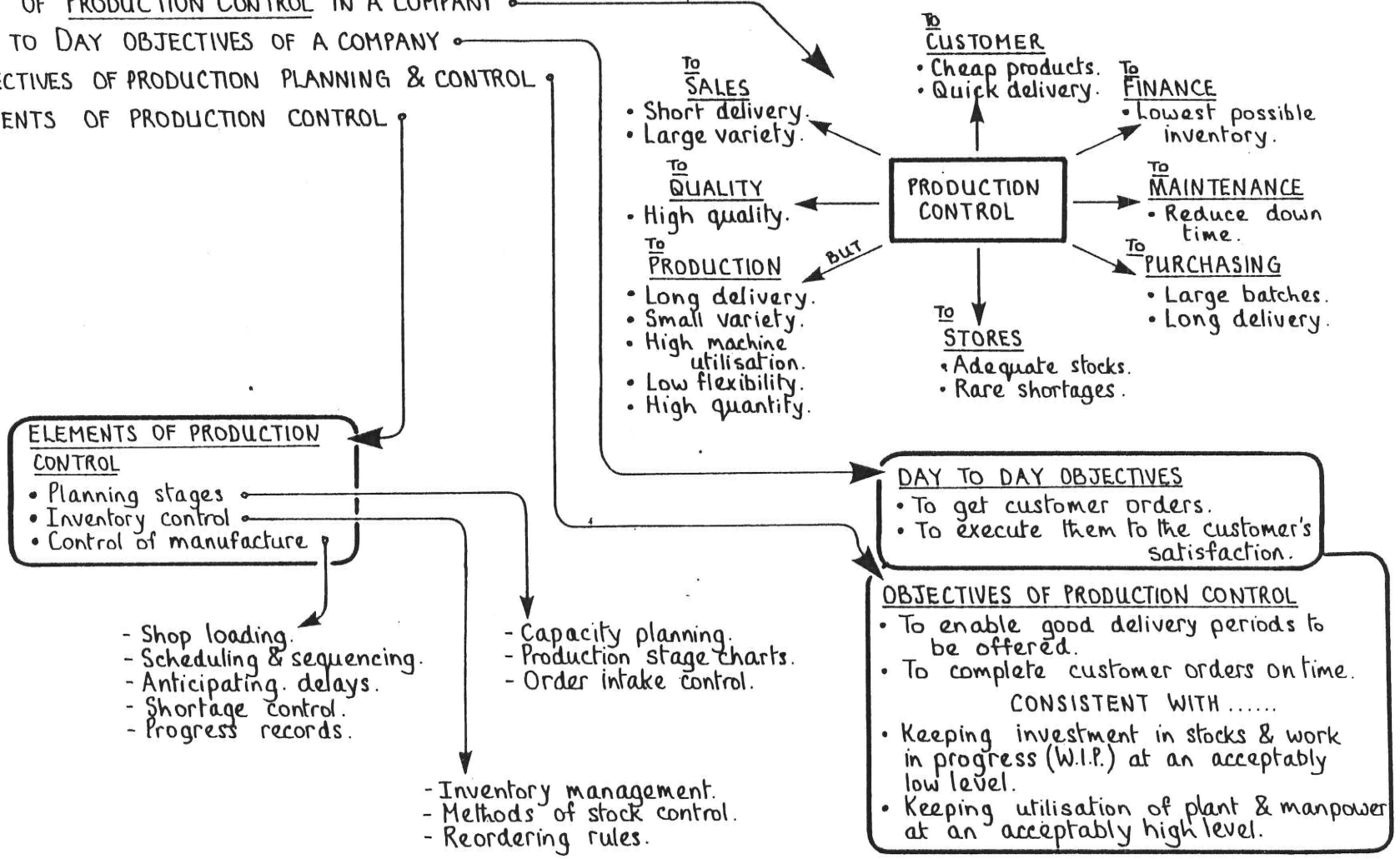
Product imitation has gone on for centuries in the production of food; weapons ; tools ; clothes ; etc.

- Imitation & Innovation are aggressive ways of dealing with change.
- Some companies will resist changes which were 'not invented here.'

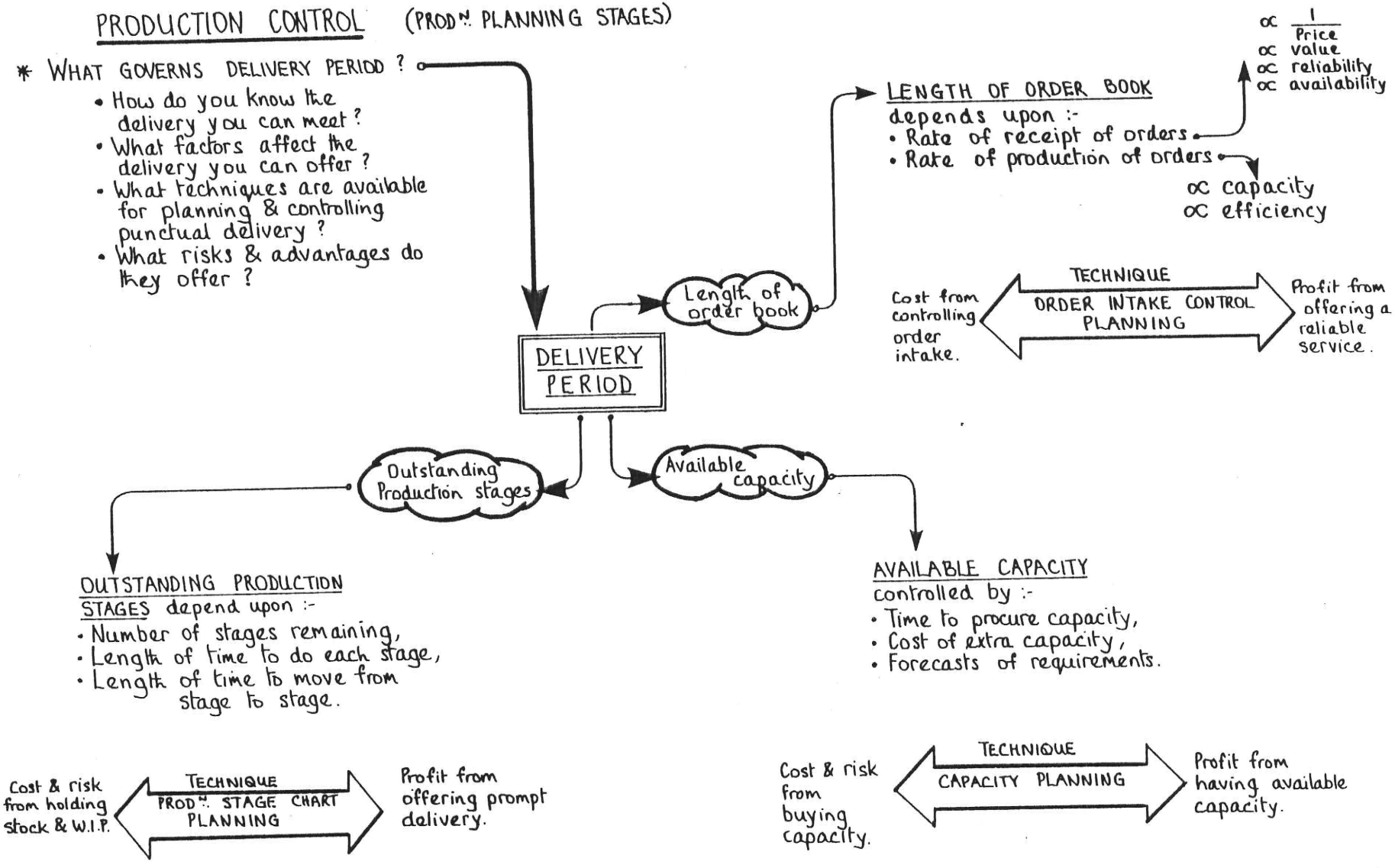
- Patents on file.
- Plant size & modernity of facilities.
- Annual company reports permit you to analyse financial ratios eg. R.&D. as a percentage of sales investment.

PRODUCTION CONTROL

* ROLE OF PRODUCTION CONTROL IN A COMPANY
* DAY TO DAY OBJECTIVES OF A COMPANY
* OBJECTIVES OF PRODUCTION PLANNING & CONTROL
* ELEMENTS OF PRODUCTION CONTROL



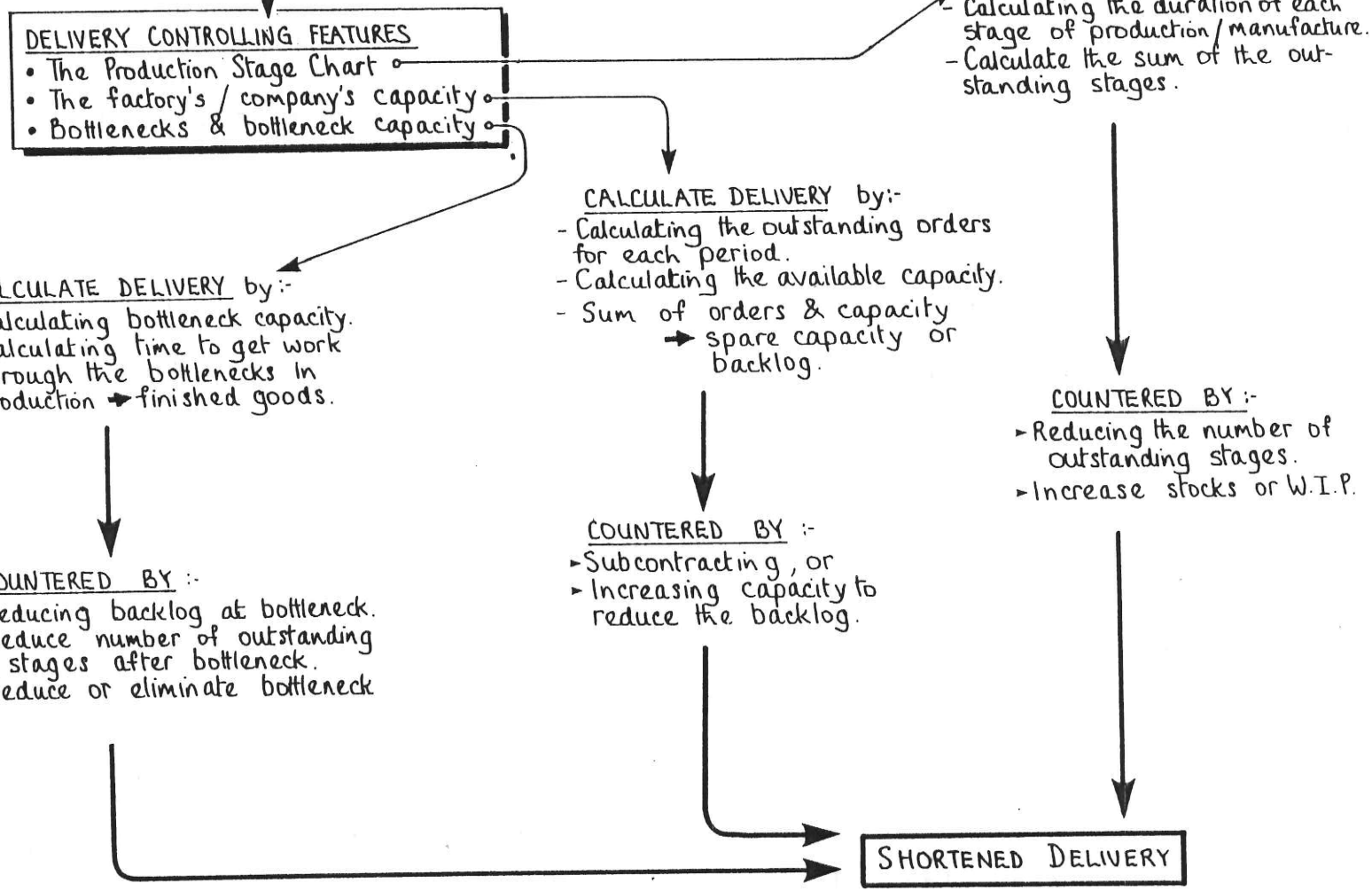
PRODUCTION CONTROL (PRODN. PLANNING STAGES)



∝ Issue 2

PRODUCTION CONTROL (SHORTENING DELIVERY)

* How is DELIVERY CALCULATED ?



← Issue 2

SIMULATION IN PRODUCTION CONTROL

* WHY HAVE SIMULATION ?
* ADVANTAGES OF SIMULATION OVER OTHER PROBLEM SOLVING METHODS
* WHERE TO USE SIMULATIONS
* USES OF SIMULATION IN PRODUCTION CONTROL

SIMULATION

- Constructs a working replica of real-life situations,
- To examine what happens following a particular course of action, &
- To communicate the effect of a set course of action.

ADVANTAGES OF SIMULATION

- A trial and error approach which shows how resources are being utilised. It considers the activity (or idleness) of each resource to evaluate effects of different strategies.

USES OF SIMULATION IN P.C.

- To optimise any combination or permutation of factors in production to :
  - maximise production,
  - maximise machine utilisation,
  - maximise operator utilisation,
  - maximise customer service,
  - minimise late delivery,
  - minimise lead time,
  - minimise fluctuations in work loads,
  - minimise slack time (in machine time).

WHERE TO USE SIMULATIONS

- QUEUE PROBLEMS - decouple the parts of a system to examine independent influences of constituent parts of the system
- STORAGE PROBLEMS

OTHER METHODS OF PROBLEM SOLVING

- INTUITIVE, quick decisions without analysis.
- NUMERICALLY, by trial & error.
- SCIENTIFICALLY, breakdown of the factors to examine their relationships.

QUEUES - where an entity in a production sequence is doing nothing.

- Finished stock queue → Decouple production from sales.
- W.I.P. queue → Decouple sequences of production units.

◁ ISSUE 2

QUALITY CONTROL

* WHAT IS QUALITY CONTROL ?
* WHERE IS Q.C. NEEDED ?
* WHAT IS THE COST OF QUALITY ?
* TOTAL QUALITY CONTROL

QUALITY CONTROL is :-
the MANAGEMENT SYSTEM within the organisation which will enable it to PRODUCE ECONOMICALLY the goods or services which will SATISFY ITS CUSTOMERS.

WHERE IS IT NEEDED ?

- In the DESIGN of an article is a need for quality standards.
- In the PRODUCTION of the article.
- In the USE of the article.

QUALITY STANDARDS come from:
- **Market Research** to determine the customer's needs using the customer's experience. (Technical & Aesthetic)
- **PRODUCT DESIGN** to blend customer needs with production resources.
- **DESIGN DEVELOPMENT** to get better value without correspond-ingly greater costs of quality (Value Analysis, Variation Research, etc.)

WHAT PRICE QUALITY ?

- FAILURE COSTS
  - Warranty costs & consumer placation.
  - Lost reputation & lost sales.
  - Internal waste - materials, time & delays.
  - Rectification costs.
- APPRAISAL COSTS
  - Inspection & testing.
- PREVENTION COSTS
  - Specification of standards.
  - Investigation of failures.
  - Design of inspection schemes.
  - Training & motivation of operators.
  - Redesign & introduction of replacement.
  - Packaging & storage.

WHAT SHOULD QUALITY COST ? 5→15% Gross Turnover

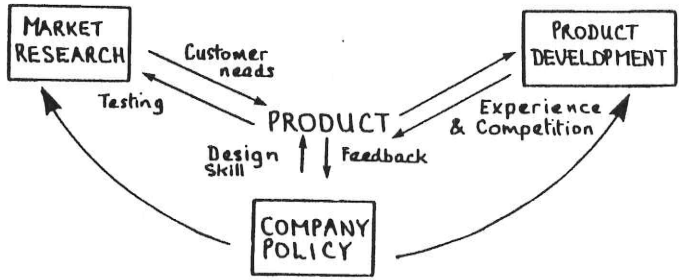
TOTAL QUALITY CONTROL means :-
- Setting quality standards.
- Detecting deviations from these standards.
- Locating the causes of these deviations.
- Motivating people to improve quality & reduce costs.

BY.....
- administrative
- technical
- statistical methods

Technical methods
Gauges; tools; optics; pneumatics; electrics; computer control; etc

Statistical sampling methods
Random sampling,
Systematic sampling,
Stratified sampling,
Controlled sampling,
Multistage sampling,
Quota sampling.

DEVELOPING QUALITY STANDARDS



GROUP MORALE

* FALSE INDICATORS OF HIGH GROUP MORALE
* FUNCTIONS OF THE GROUP
* TRUE HIGH-MORALE INDICATORS
* LOW-MORALE INDICATORS

FALSE INDICATORS

- ORDERLINESS - may be due to firm discipline.
- HIGH PRODUCTIVITY - may also reflect high levels of discipline.
- LACK OF CONFLICT - indicates the group's ability to cope with conflict.

These 3 are sometimes used as indicators of high morale but are not reliable.

FUNCTIONS OF THE GROUP

Differ for individual group members - may include :-

- provides status,
- leads to better pay,
- may just provide more interesting work,
- socially & politically advantageous.
- other reasons.

HIGH-MORALE INDICATORS

- Consensus on goals & objectives.
- Positive attitude to goals.
- Internal cohesiveness & supportiveness
- Adaptability to institutional change.
- Confidence in its internal management & leadership

LOW-MORALE INDICATORS

- Factioning under pressure.
- Mutual distrust & criticism of members by members
- Lacking adaptability & the willingness to try.
- Lacking consensus in goals & objectives.
- No sense of identity.
- Open & frequent criticism of management & its policies.

GOOD FOR MEMBER'S HEALTH

- Individuals get solace & courage from fellow members.
- Lessens work related anxieties.
- Produces feelings of 'pride in association'.

- High cohesion has potential
  - for good (high productivity),
  - for trouble (radical reformists).
- Cohesiveness decreases as group size increases.
- 'Effective' cohesive groups (of 6 or 7 members) are potentially good 'team' size.

- Leads to labour turnover & unexcused absenteeism.

- Often gives high levels of Job Satisfaction.
- High productivity also, when there is confidence in the organisation's management at all levels.

MANAGERIAL INCENTIVES

* ORGANISATIONAL FEATURES
* TYPES OF INCENTIVE
* ASSOCIATED PROBLEMS FOR ORGANISATION

ORGANISATIONAL FEATURES

- Organ^{ns} believe managers are motivated & willing to work together towards long-term organisational objectives.
- Too few organ^{ns} consider that managers' personal objectives may differ from those of the organisation.

RESULT :- dissonance / incongruence.

e.g. - short-term window-dressing to stimulate promotion.
- A desire for job autonomy or greater span of authority.
- Fear of being transferred between jobs (sideways or downwards) resulting from failure to achieve corporate objectives is a powerful motivator in some.

TYPES OF INCENTIVE

- Financial
- Non-financial
- Individual feedback

- Systematic reviews of operating performance,
- Praise & criticism when due.....

are behavioral incentives which are quite personal.

Monetary rewards are of limited value to senior executives :
- Bonus (or raise) payments are possibly subject to punitive tax assessments.
- Stock options, may fluctuate in value due to market forces & managers may not gain due to forces beyond their control.

- Job promotion relates promotion to performance. (fairer & more professional)
- Increased discretion eg. discretion over fund usage or freedom to design strategy, enriches one's job.
- Fringe benefits
  - cars,
  - vacations,
  - insurance & pensions,
  - health schemes,
  - subsidised housing or low-interest mortgages,
  - larger / improved status symbols
    - titles,
    - furnishings,
    - office locations or sizes,
    - assistants.

ASSOCIATED PROBLEMS

- Incentives, usually skewed to achievement of short-term objectives.
- Job rotations reduce a manager's accountability for achieving long-term objectives.
- Once given, incentives become 'rights' & are rarely withdrawn.

INCENTIVES must be tied to performance as indicated by objectives achieved; budgets contained; etc. MANAGERIAL INCENTIVES should be seen as a part of the overall strategic management design task. (P. Lorange 1980)

∝ ISSUE 1

REMUNERATION & FINANCIAL REWARD

* FEATURES OF A PAY POLICY
* LINKING FACETS

FEATURES OF A PAY POLICY

The organisation should be able to explain :-

- Its aims
- The wage & salary structure employed → - Why was this scheme adopted ?
- How jobs are evaluated & work assessed.
- Method of appraisal → - Frequency & procedures.
- Review procedures & appeals → - How conflict will be resolved. - Grievance procedures.
- Career progression within the structure
- Remuneration, other than pay → i.e. Monetary value of fringe benefits like.....
  - company car,
  - pension schemes,
  - tied accommodation,
  - subsidised canteen & staff sales, etc.

LINKING FACETS

Job descriptions; Fringe benefits; Job evaluations; Job design; Job comparisons; Appraisal outcomes; National agreements; Participation; The current labour market; Size of organisation.

- Small organisations may have an informal pay policy.
- Medium sized organisations need closer controls.
- Large organisations require more sophisticated systems.

The organisation is looking for a balance which will satisfy co. objectives :

- Attract the right staff,
- Satisfy current employees,
- Improve their output/productivity,
- Maintain good internal relationships,
- Acknowledge national agreements,
- Be seen to be fair & equitable. → How open are the accounts to union scrutiny ?

Job Design incorporates principles of :

- Job Enrichment;
- Job Enlargement;
- Job Rationalization;
- Autonomous work groups;
- etc.

* PAYMENT SYSTEMS

Examples are :-

- Payment by Results → - Piece work, commissions or bonus payments.
- Payment by Time → Payment by time has advantages :-
  - stable pay packets,
  - easier to administer,
  - simple to operate,
  - easier to change,
  - can apply across the organn.,
  - seen to be equitable.
- Incentive systems → - Profit sharing; share purchase; productivity bargaining.
- Status / merit rewards → - For special skills or responsibilities; qualifications or experience.

HOW TO AVOID CONFLICT

Suggestions may include :-

- Using a third person
- Build interpersonal relationships
- Re-examine the situation
- Manage the situation
- Practice intergroup maintenance
- Improve the process

USING A THIRD PERSON

- Find an arbitrator to bring them together.
- Call in an expert.
- Deal through an agent.

BUILD INTERPERSONAL RELATIONSHIPS

- Relieve tension, crack a joke, have a drink.
- Learn how to apologise gracefully.
- Learn how to grovel realistically.
- Come together.
- Improve communications.

RE-EXAMINE THE SITUATION

- Identify the source of conflict.
- Increase objectivity
- Help them air preconceived feelings & ideas.
  - remove stereotypes & myths.
  - help them share pre-conceptions.
- Test assumptions.

MANAGE THE SITUATION

- Divert attention.
- Change direction.
- Allow time to defuse the situation.
- Walk out.
- Ignore / get rid of the other person.

IMPROVE THE PROCESS

- Identify & clarify points of view.
- Help people to contribute.
- Suggest alternatives.
- Suggest compromises.

PRACTICE INTERGROUP MAINTENANCE

- Rotate group membership.
- Avoid WIN : LOSE situations.
- Set up WIN : WIN situations.
- Create a shared identity.
- Provide a shared objective.

RESOLVING CONFLICT (BETWEEN GROUPS & INDIVIDUALS)

* PROBLEMS OF RESOLVING CONFLICT
* WAYS OF RESOLVING CONFLICT

CONFLICT THEORY :- assumes conflict arises from inherent differences between individuals or groups & should be seen as a normal & continuing problem in organisations. It is seen as a means of progress not as something to be avoided.

PROBLEMS OF RESOLVING CONFLICT

- One person's/group's view to be upheld
- Another person's/group's view is denied

} → WIN : LOSE outcome

- Compromise is not always possible or feasible.
- A conflict spiral may develop
  - Protagonists develop destructive attitudes & behaviour patterns.
  - Perceptions become grossly distorted.
  - Winning is paramount, issues are secondary.
- Often conflict cannot be legislated for.
- Knowing when the protagonists are ready to negotiate.
- Lack of a common vocabulary
  - A question of semantics

WAYS OF RESOLVING CONFLICT

- Improve communications between the groups or individuals.
- Keep the parties talking & increase contacts.
- Direct counselling.
- Listening, & absorbing aggression.
- Bring in outside conciliators.
- Reconstruct their perceptions of the situation.
- Unify the protagonists
  - To form one super-ordinate group.
  - Against a common adversary or an over-riding goal.
- Impose a solution to the conflict.
- By confrontation
  - An open, problem-solving approach where both parties state their views & have them considered.
- Separation (of individuals)
- Agree to disagree
  - Often dissolves the conflict.

* VALUE OF CONFLICT
  - Denies the status quo, prevents stagnation.
  - Introduces / speeds propensity for change.

* CAUSES OF CONFLICT
  - Conflict arises between individuals & groups because of different ways of working in terms of time, goals, structures & inter-personal relationships.
  - Best kept <u>OPEN</u> so that agreed rules & procedures may be used to resolve it.
  - Cooperative theory does not mean unanimity or agreement but discussion & joint endeavour.

CO-OPERATIVE THEORY assumes people are reasonable &, if provided with adequate info: & opportunity, will work to reduce conflict by negotiation. Individual democracy leads to a problem-solving approach to resolving differences.

Issue 1

TRAINING PHILOSOPHY (COURSES)

- Assumptions about training
- Stages of Training & Development
- Working with a group of trainees

GROUPS OF TRAINEES ON COURSES

- The group & trainer comprise a learning community,
  - sharing ideas & experience,
  - allowing input.
- Group development stages

FORMING - getting to know each other.
NORMING - establishing ways of working together.
STORMING - venting frustrations.
PERFORMING - effective working.
MOURNING - sadness on break-up.

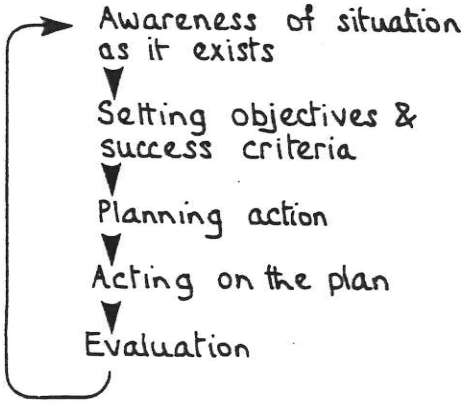
- Group working :-

TASK = WHAT YOU DO
PROCESS = MANNER IN WHICH THE TASK IS PERFORMED

ASSUMPTIONS

- We are born with propensities.
- We develop in unique ways.
  - you are the sum of your history.
- Individuals are responsible for their own learning - others can help.
- There are a large range of options of behaviour available (Some are preferred.)
- No attempt is made to impose behaviour patterns.
- We must choose appropriate behaviour for differing circumstances.
- Through training you may become greater than the sum of your history.
- Everyone is "good" but could be "better."

STAGES (on courses)



SKILL TRAINING & ANALYSIS

* ACHIEVING EXPERIENCED WORKER PERFORMANCE
* SKILL ANALYSIS
* USING THE SKILL ANALYSIS

SKILL TRAINING is a 3-stage process :
- Receptor Stage,
- Decision making,
- Effector Stage, ...

with a constant throughput of information to the brain from Stage 1 to modify Stages 2 & 3.
Acquiring Knowledge needs a language for Trainer & Trainee.
Trainer Skill :- to code knowledge in word symbols.
Trainee Skills :- to decode those symbols to arrive at a common meaning.

OBJECTIVE :- (E.W.P.)
EXPERIENCED WORKER PERFORMANCE

ACHIEVING E.W.P.
For every job there is :-
- The Knowing side
- The Doing side (Skill content)

SKILL ANALYSIS
Examines in detail :-
- What limbs & body members are involved.
- The type of movement they perform.
- The senses which are involved in initiating, controlling & terminating those movements.

SKILL CONTENT
- Refer to the Job Description to know WHAT the skill contents of the job are.
- Refer to an E.W. to determine HOW they are used.

KNOWING SIDE
Requires knowledge of:
- the WORKPLACE → given in Induction Training.
- the JOB
- the QUALITY

IMPARTING THE KNOWLEDGE
- from 'known' to 'unknown'. Start from where they are & relate what has to be learned to their present knowledge & experience.
- it aids understanding if the trainee knows the purpose of the activity or the reason for knowing.

- of the tools to be used,
- of the materials,
- technical knowledge of the process or machine,
- safety training,
- knowledge an E.W. uses from time to time.

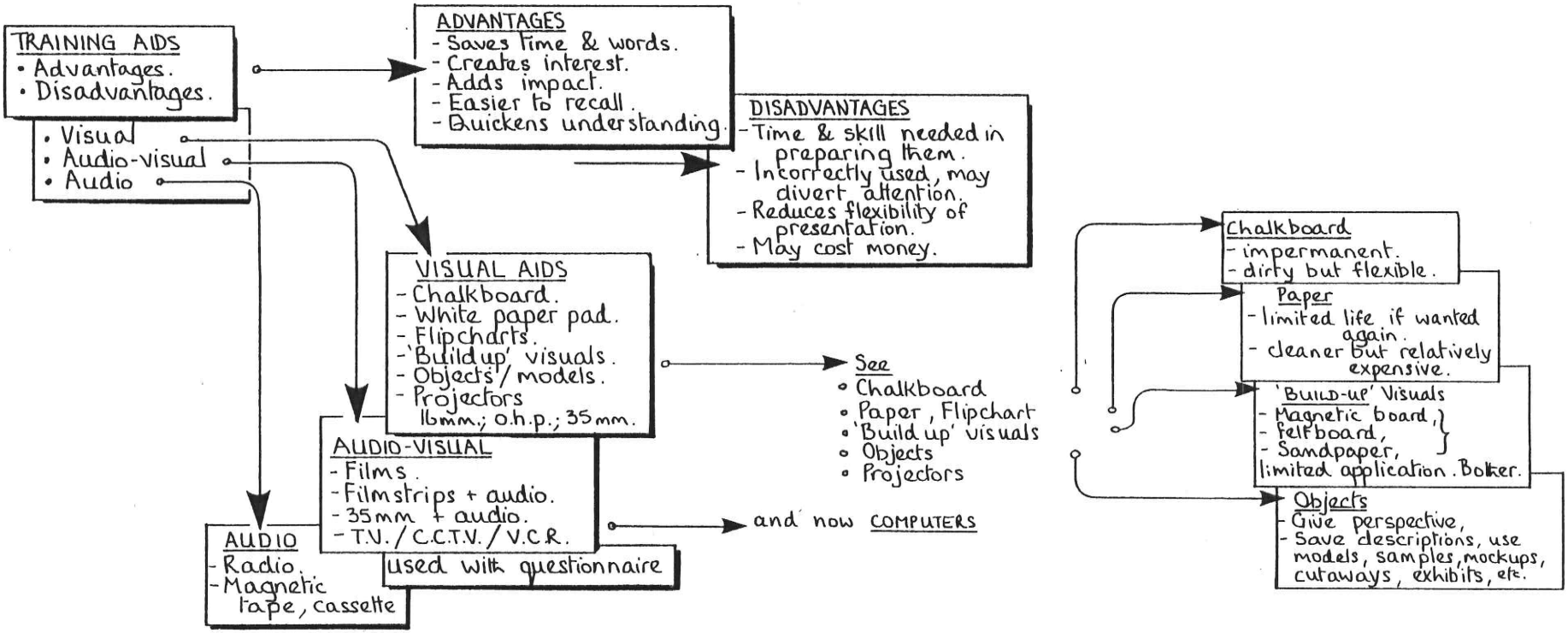
- Know the quality specifications,
- basic fault recognition, analysis of causes, correction & prevention.

USING THE SKILL ANALYSIS
Skill analysis is used to develop a training scheme.
- Into what parts/sections can the task be suitably subdivided?
- Can you identify job elements which involve judgement & decision making?
- Identify any unusual movements
- Identify any unusual use of the senses

→ - These will take longer to learn.
→ - To design special training exercises.
- To consider the posture to be adopted.
- To develop the control, coordination or rhythm required.

- to a high level of discrimination? (Preliminary exercises may be provided.)
- the E.W. can explain HOW they are used.

TRAINING AIDS



CAVEATS

- Why use it ? What will it show ?
- Is the visual aid .....
  - too comprehensive ? = distracting
  - too crowded ? = unintelligible
  - too complex ? = confusing
  - too colourless ? = lacks interest
  - held too long ? = boring
  - not explained ? = switches off
- Will my projector work ? = panic
- Is the room suitable ? = can they see ?

STORAGE OF V.A.'s

- Containers for the aids.
- Summary of aids.
- Indexing the aids.

SELECTION (BY OBJECTIVES)

* PROBLEMS OF INADEQUATE SELECTION
* SELECTION PROCEDURE FOR EMPLOYER
* ACCEPTANCE CONSIDERATIONS FOR APPLICANTS

INADEQUATE SELECTION activities may lead to :-
- Appointment of misfits.
- Bad choices may perpetuate themselves.
- Loss of confidence in the system.
- Expense & worry & uncertainty of removing the new appointee.
- Damage to organisation's reputation; standing; loss of customers; etc.

SELECTION PROCEDURE FOR EMPLOYER
- EXAMINE vacant position for 'position profile'
- EXAMINE applicants for 'fit factor'

POSITION PROFILE
- Define objectives for post.
  - for 3 months
  - for 12 months
- Identify possible frustrations associated with the post.
- Identify performance expectations
- Specify authority which goes with the post.
- Specify reporting relationships.

FIT FACTORS
- Qualifications,
- Temperament,
- Knowledge,
- Social compatability & culture.

ACCEPTANCE CONSIDERATIONS
(After Maslow) Applicants should consider :-
- Will the post satisfy my BASIC NEEDS for security, money, etc. ? What will be the costs/gains of accepting ?
- Will the post satisfy my EGO NEEDS for power, deference, etc. ?
- Will it satisfy my SOCIAL NEEDS for relationships leading to satisfaction
- All else being satisfied, will I be able to express my highest levels of need-creativity & self-actualization ?

* OTHER SELECTION METHODS

- Psychological, personality & aptitude testing.
- Background approach - & need for paper qualifications.
- Using past patterns of behaviour as predictors of the future → See Outlines 3.31 & 3.32 on S.I.M.A. patterns.
- Interviews, & a subjective consideration of attributes.

∝ Issue 1

DISCIPLINE (USING OBJECTIVES)

- ✳ DISCIPLINE BY OBJECTIVES
- ✳ DISCIPLINE IN THE WORKPLACE
- ✳ PROGRESSIVE DISCIPLINE
- ✳ REVIEWING RULES

DISCIPLINE BY OBJECTIVES .....

- is acceptable if legitimate.
- is a shaper of behaviour.
- makes individuals responsible for their behaviour.
- draws on past experience but is not negotiable concerning the future.
- sets sensible rules with periodic reviews.
- becomes less punitive
- considers the objectives & purposes of the company.

The modern attitude is that people expect to have more control over their own lives & conduct. Everyone has rights that should be respected.

- Offers group judgements on an individual's actions.
- Permits representation & the right to confront accusers.
- Permits the right to appeal.

PROGRESSIVE DISCIPLINE

- Ranks & lists categories of offence.
- Lists procedures & stages leading to termination of employment.
- Requires careful recording of incidents & the subsequent disciplinary actions.
- Allows for removal of incidents from personnel records after a set time.

DISCIPLINE IN THE WORKPLACE

Special features :-

- Makes correction of breaches of discipline an opportunity for coaching
- Invites the rule breaker to offer 'objectives of non-compliance' & not 'excuses'.
- Permits departure from rules/regulations in pursuit of objectives
- Does not hold rules/regulations as sacred if their contribution to objectives is marginal.

- Especially for 'non-rule' offences ie. causes of concern but not rule violations.
- Permits & promotes innovative behaviour.
- Recognises exceptional performance.

REVIEWING RULES

- Ranks rules alongside their contribution to objectives
- Acceptable controls
- Un-acceptable controls
- Do they/should they apply....

RULE AS STATED	CONTRIBUTION TO OBJECTIVES
[illegible]	[illegible]

- Its company policy.....
- Its always been the case...
- Its what the bosses want.
- etc.

- Protects your safety.
- Protects safety of others.
- Reduces waste/spoilage.
- Improves quality.
- etc.

- In every circumstance ?
- On all locations ?
- To all personnel ?

· Consistency of application avoids disputes & feelings of injustice.

Contents

PART 1 PERSONNEL FUNCTIONS

Stages in Recruitment & Selection	5.01
Interviewing and Addressing People	5.02
Interviewing	5.03
Questioning at Interviews	5.04

PART 2 COMMUNICATION/COMMUNICATING

Business by Telephone	5.05
Using the Telephone for Business	5.06
Oral Communication - Listening	5.07
Oral Communication - Speaking	5.08
Effective Speaking	5.09
Efficient Reading	5.10
Communicating Instructions	5.11
Communication & Motivation	5.12
Communications in an Organisation (Supervisor's role)	5.13
Behavioural Communication	5.14
Algorithms	5.15
Spider Diagrams	5.16
Thinking	5.17
Better Thinking	5.18

PART 3 TRAINING

Aspects of Learning Technology	5.19
Use of Visual Materials in Instruction	5.20
Making a Presentation - Preparations	5.21
Making a Presentation - Considerations	5.22
Improving the Effectiveness of Lectures	5.23
Action Learning - Operating Features	5.24
Effective Learning Materials	5.25

PART 4 SELF DEVELOPMENT

Career Paths for Professional Managers	5.26
Life Investments for Professional Managers	5.27
Self Marketing	5.28
Self Evaluation	5.29
Managerial Stress	5.30

PART 5 MARKETING AND ADVERTISING

Advertising	5.31
Creating an Advertisement	5.32
Advertising by Direct Mail	5.33
Franchising	5.34
Setting up a Franchise	5.35
Sponsorship	5.36
Surveys	5.37

PART 6 STOCK/MATERIAL MANAGEMENT

Systems Analysis	5.38
Energy, Utility & Resource Management	5.39
Purchasing & Storekeeping	5.40
Stores Management	5.41
Materials Management	5.42
Maintenance Management	5.43
Stock Control	5.44
Using Equipment & Facilities	5.45

PART 7 MISCELLANEOUS

Company Structures	5.46
Safety and Health	5.47
Public Relations 2	5.48
Features of Project Management	5.49
Clerical Work Evaluation	5.50

PART 8 KEYWORD INDEX

Keyword Index	p 51
List of associated papers	p 54

The following typed (A4) information papers, forms and exercises accompany some of the Outlines in Volume 5. Their value lies in the way they expand on aspects of the Outlines themselves. Their use is optional.

INFORMATION PAPERS

A.4	Effective Speaking
A.29	Management of Change
A.31	Network Analysis
A.60	Purchasing
A.77	Clerical Work Analysis
A.106	Report Writing
A.107	Choice of words
A.109	Communication & Activation
A.123	Maintenance Management
A.136	Rating & Using Supplier Resources
A.137	Purchasing Procedures
A.161	Legal aspects of purchasing
A.171	Recruitment & Selection
A.178	Inventory management
A.299	Algorithms
A.328	Behavioural Communication
A.329	Listening
A.346	Causes and consequences of industrial stress
A.364	Interviewing for information
A.370	Maintenance Cost Contro;
A.371	Steps in planned maintenance application
A.372	Introduction to planned maintenance
A.373	Preparation for planned maintenance
A.374	Maintenance planning & control method
A.375	Compiling the plant inventory
A.378	Communicating complex information
A.396	Action planning techniques
A.402	Project Evaluation
A.403	Exponential Smoothing
A.456	Decision trees
A.662	The Johari Window
A.680	Factors hindering effective communication
A.739	Stores management principles

EXERCISES

C.94	Clerical Work Evaluation Exercise
C.95	Halcyon Engineering Ltd - CWE exercise
C.96	Diary editing exercise (CWE)
C.97	Activity sampling exercise (CWE)
C.98	Task Definition - part 1
C.99	Basic Case Study - part 2

Exercises (continued)

C.102	Derivation of Exchange Curve
C.103	Derivation of Exchange Working Inventory
C.104	Basic Stock Control - PCP
C.105	Planned Quantity Stock Control
C.130	Park Estate Carpet Co. - O & M Exercise
C.132	Decision trees
C.146	Forecasting
C.176	Designing Algorithms
C.246	Problem Analysis Exercise
C.349	Problem Analysis Exercise - (Experimental results late)
C.445	Body Language
C.482	Stores Management Problem
C.483	Stores Resposibilities
C.484	Stores Classification
C.485	Stores Organisation

FORMS

F	23 ; 37 ; 38

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STAGES IN RECRUITMENT & SELECTION

* Is there a job to be done ?
* Can it be filled ?
* Identify the job.
* Looking for the person.
* Deciding on the person.
* Administration.

IS THERE A JOB ? May become obvious through :-
- Results of work study.
- Job analyses.
- O. & M. review.
- Opinion

CAN IT BE FILLED ?
One may also ask 'may it be filled ?'
- Does it suit the corporate plan?
- Does it fit in with the manpower plan?
- Have we the authority to fill it ?
- Is there finance to cover it ?

IDENTIFY THE JOB
- Produce Job Description.
- Produce Job Specification

Produce Man Specification for personnel's use :-
- 7 point plan,
- 5 fold grading,
- what legal restrictions?
- any medical considerations?

LOOKING FOR THE PERSON
- Who could fill it ? → See 'Man Spec:'
- Where do we look ? → Inside or outside the organisation ?
- What sources of recruitment ! → **SOURCES OF RECRUITMENT**
  - Employment agencies.
  - Job centres.
  - Professional bodies.
  - 'Head-hunters'
  - Advertise.
  - Personal contacts.
  - Poaching.
  - Schools, colleges, universities.

DECIDING ON THE PERSON
- What sources of info" are available ? → **WHAT SOURCES OF INFO"**
  - Application form.
  - Interview.
  - References.
  - Tests.
- How do we short-list the candidates ? → Lay down criteria.
- How do we decide ? → **DECIDING**
  - What is personnel officer's responsibility ?
  - What is the manager's role ?
  - Does / will the person 'fit' ?
  - Is the pay right ?
- Selection.

WHAT FURTHER ADMINISTRATION ?
- The unsuccessful applicants ? → Tell / thank them
- The person appointed ? → **PERSON APPOINTED**
  - Contract of appointment...
  - Records to be completed.
  - Induction procedures
  - Further training ?
- Review the process → **REVIEW**
  - The cost of the process.
  - The effectiveness of procedures.

A 171 - RECRUITMENT & SELECTION
A 364 - INTERVIEWING FOR INFORMATION
FILM - 'MANHUNT'

INTERVIEWING & ADDRESSING PEOPLE

* Definition
* Factors contributing to rapport

DEFINITION

- An interview is a conversation with a purpose usually 1:1
  - Tx - the transmitter of the comm^{n}.
  - Rx - the receiver of the comm^{n}.
    (there may be many Rx's)

'PURPOSE-LESS CONVERSATION'

- a form of 'social grooming'.
  eg. about the weather - often with casual or unknown contacts.
  'Good morning, how are you?'

FACTORS

- Proxemics.
- Orientation.
- Environmental characteristics.
- Non-verbal signs.
- Other 'spoken' communication.
- Dominance Roles & Rituals.

PROXEMICS - the closeness of the Tx to the Rx(s).

Consider closeness but be aware of cultural differences & taboos, especially between strangers. With closeness note mirroring of body movements.

→ including touching the Rx.

INTERCALARY EXPRESSIONS

Superfluous & meaningless eg. 'you know', 'I mean', 'really' and also grunts, snorts, etc.

ORIENTATION - relative positions.

- Side-by-side can imply friendliness, intimacy, helpfulness, etc.
- Face-to-face can imply competition, confrontation, etc.
- Territoriality - on whose ground will the interview take place? (His / yours / neutral?)

→ may imply...
- aggressive intent,
- defensive reaction,
- submissive attitude,
etc.

DOMINANCE ROLES & RITUALS

Rituals of greetings & farewells,
- handshake, kiss, hug, bow, salute, curtsy, raised hat, etc.

ENVIRONMENTAL CHARACTERISTICS

- In a large space, Rx's group .....to hear better?
- In a small space Rx's separate... maintain personal space?
- Furniture, eg. tables ....could form psychological barriers.
- No furnishings .... Rx feels exposed & vulnerable.
- Ambient noise too high .... may hinder comm^{n}. flow.
- Distances too great.....
- Atmospheric conditions... (heating/lighting/ventilation)

NON-VERBAL SIGNALS

- Gaze → direct mutual gaze implies intimacy. Emotions perceived from eyes eg. anger, pleasure, surprise.
- Mouth → A smile encourages & reassures - communicates emotional state - controlled or uncontrolled.
- Eyebrows → Raised rapidly - greeting, flirting, ...etc
  Furrowed - puzzled, angry, ... etc
  → Head movements - nods, shakes & tilts.
- Posture → Lean forward - confidentiality, intimacy, ...etc
  Lean back - relaxed, easy, less concerned, ...etc
- Gesture → Hands - fingers open, closed, fist formed...
  Fingers - relaxed, pointed, ...
  Limbs - open or closed
  Hands - moving or positioned
  } Indicative of emotional states or moods
- Tone → Tone (of voice) - soft/friendly - loud/assertive, pitch, stress & timing imply mood & emphasis.
- Touch → Between sexes - strokes, holds, pats ... friendly. Hits - less friendly. Handshake - ritual touching for reassurance
- Clothes → Indicate something of a person's values, status & authority, or just bodily adornment.

INTERVIEWING

* What is an INTERVIEW ?
* Types of interview.
* Stages in interviewing.
* Why bother to interview ?
* Points to establish
* Skills of an interviewer

WHAT IS AN INTERVIEW ?

- A two-way communication
- A conversation with a purpose.

TYPES OF INTERVIEW

- Recruitment
- Counselling
- Disciplinary
- Appraisal
- Grievance
- Exit → on leaving a post

STAGES

- Preparation
- Interview
- Post-Interview

PREPARATION

Know :- the purpose & objectives,
if recruitment { job description, man specification, application form, & references.
Setting :- venue, ensure privacy, be comfortable, reduce potential psychological barriers.

INTERVIEW

- Introduction → Explain purpose, Introduce self & role, Establish rapport, Outline procedure
- Body → Keep objectives in mind. Work to a plan. Use questionning technique
  1. Closed Q's YES/NO
  2. Leading Q's.
  3. Open Q's - with 'wh' words.
  4. Probing Q's.
- Closing → Summarize, Invite Q's, Answer Q's, Explain next steps.

POST-INTERVIEW

Assess information.
Record info.
Evaluate
Follow-up (with successful candidate)

WHY INTERVIEW

- Advantages → ADVANTAGES
  Gets a whole picture.
  Flexible.
  2-way.
  Socially acceptable.
  Lack of suitable alternative.
- Disadvantages → DISADVANTAGES
  Subjective.
  Expensive.
  Time consuming.
  'Interviewer influenced'

WHAT TO LOOK FOR... 7 point plan

- Physical make-up → defects likely to impair performance.
- Attainments → education, training, experience.
- General intelligence
- Special aptitudes → mechanical, figures, etc.
- Interests → social, intellectual, practical, artistic, physically active, etc.
- Disposition → temperament, self-reliance, charisma.
- Domestic circumstances → compatible with success & satisfaction in the job.

QUALITIES / SKILLS NECESSARY

- Control the pace.
- Listen, observe, use silences intelligently.
- Establish rapport quickly, reduce stress
- Sensitivity & Flexibility
- Encourages talking → use non-verbal encouragers, keyword repitition, paraphrasing, plain, unambiguous language.

COMMON FAULTS

Going on initial impressions - HALO or HORNS !!
Talking too much at expense of interviewee.
Unspecified / confused objectives.
Bias & prejudice - the influence of one's likes/dislikes
Unsystematic / poor planning.
Failure to establish rapport.
Stereotyping - fixed mental impressions.

where 1 good / bad characteristic influences disproportionately

QUESTIONING AT INTERVIEWS

* Why ask questions ?
* Types of questions
* Questions to be avoided.
* Preparation for an interview.
* Interview review

PAPERS :-
A171 - Recruitment & Selection

WHY ASK QUESTIONS
- to find attitudes/opinions/facts

FACT FINDERS
The lost, or unknowing, seeking guidance. e.g.
Doctors - for guidance.
Police - information seeking.
Social workers - assessing or counselling.
Interviewers - selecting, appraising, counselling, staff. etc.

TYPES OF QUESTIONS
Most commonly used :-
- Open
- Closed
- Probe

OPEN QUESTIONS - used
- to establish rapport.
- to explore background information.
- to explore opinions & attitudes.
- to encourage a person to talk.

eg. "Will you tell me about....."
"What are your thoughts..."
"Why did you....."
"How would you...."
(use 'wh-' words)

INTERVIEWER remains bland/neutral/unprejudiced/unrestricting.

CLOSED QUESTIONS
- to establish specific facts & information.
- to yield YES/NO responses.
- for identification.

INTERVIEWER works harder than interviewee composing Q's but gets direct & specific answers back.

PROBE QUESTIONS
- to search in more depth

INTERVIEWER requires sympathy, employs careful listening techniques, remains calm & friendly & does not offer offence.

Supportive ploys include :
- non-verbal noises ("yes, um, oh...")
- pauses silences (interviewee fills them)
- supportive statements.
- keyword repetition & mirror Q's
- head nods & eye contact maintained.

Q's TO AVOID
- Leading Q's - prompt a desired answer.
- Trick/ambiguous Q's - confuse & mislead.
- Multiple/marathon Q's - confuse & mislead.
- Rhetorical Q's - cannot provoke replies.
- Discrimination Q's - indicate bias & discourage interviewee.

PREPARATION
- By interviewee
- By interviewer

INTERVIEWER PREP^{N}
- have clear objectives.
- structure the session.
- have a pattern of Q's ready.
- use plain language.
- observe non-verbal signals from interviewee.
- maintain a friendly atmosphere & interest.
- avoid dominating the conversation, don't interrupt & criticise.

INTERVIEWEE PREP^{N}
- keep calm & contain emotions.
- remember how non-verbal signals may communicate.
- think what your body movements/posture is communicating.
- don't clam up.
- think before answering.

INTERVIEW REVIEW
- Does your Q's technique...
  - probe deeply enough?
  - maintain continuity?
  - cover a wide spectrum?
  - enable you to maintain rapport.
- Are you ....
  - recording the answers?
  - controlling the interview?
  - properly prepared to begin?
  - really listening to the replies?
- Do you...
  - end on a positive note?
  - interpret the answers correctly?

BUSINESS BY TELEPHONE

- Know what is good practice
- Handling complaints
- Handling credit control
- Handling sales calls
- Barriers to comm.ⁿ by 'phone

ASPECTS OF GOOD PRACTICE

- Control the call.
- Be polite.
- Be efficient.

CONTROL THE CALL

- Use good questioning techniques to :-
  - take control of the call.
  - keep control of the call.
  - determine the callers' purpose.
  - ensure the caller understands.
- Use different types of questions for different purposes:-
  - closed questions for specific information.
  - open questions for attitudes & opinions. (S. 200f)

BE POLITE

- Listen carefully
- Sound friendly & interested.
- Use courteous words & phrases.
- Avoid emotive expressions.
- Handle delays courteously.

BE EFFICIENT

- Have the 'phone close by you.
- Have pen/paper ready.
- Answer incoming calls quickly.
- Take messages accurately.

HANDLING DELAYS

- Acknowledge the problem.
- Sympathise with the caller.
- Apologise for delays.
- Offer alternative action.

TAKING MESSAGES

- Record date/time/callers' name & job title / 'phone-back number / action taken / action to be taken.

HANDLING COMPLAINTS

- Listen, don't argue, stay calm.
- Record the facts as given.
- Sympathise.
- Acknowledge the problem.
- Apologise if necessary.
- Agree action & follow up.
- Record action taken/ to be taken.

HANDLING CREDIT CONTROL

- Prepare yourself with all relevent data.
- Locate the right person. → Personal 2-way comm.ⁿ gives & receives info.ⁿ quickly
- Anticipate excuses using prepared Q's in countering.
- Specify & agree action within specified time.
- Record details & follow up action

FOLLOW-UP

- Paperwork must follow for:-
  - vetting,
  - terms of trade,
  - credit control letters,
  - confirmation of discussion,
  - getting references.

HANDLING SALES CALLS

- Have your sales literature to hand. → Also clear objectives for making the selling call.
- Know your product. → Range, functions, unique selling points, prices, delivery times, alternatives, etc., discounts, terms of trade.
- Know your competitors. → Features, prices, shortcomings,
- Use open Q's to establish the customer's needs. → "Tell me about your problem." "What do you want the product to do ?"
- Counter price objections with benefit (values) answers.
- Make it easy to say 'YES'.
- Closure - agree action plan.
- Record call / action taken/ follow up/etc.

COMMUNICATION BARRIERS

- Physical. → Lack of time & preparedness. Noise on the line. Colleagues interrupting. Lack of non-verbal comm.ⁿ cues.
- Psychological → Lack of interest. Attitude to caller. Localised distractions. Poor listening. Too emotional :- angry; hostile; too involved; unprepared; etc.
- Semantics → Inappropriate words; use of jargon or emotive words; wrong meanings inferred.
- Passing the message. → Encoding; transmitting; receiving; perceiving; & accepting.

LISTENING ≠ HEARING
LISTENING = Hearing + perceiving + understanding.

USING THE TELEPHONE FOR BUSINESS

Tx. = transmitter
Rx. = receiver

- Why use the telephone ?
- Skills of the Tx.
- Consider the Rx.
- Procedures
- Reducing costs

WHY USE IT ?

- Good medium of communication.
- Can be economical
- Disadvantages.

GOOD MEDIUM ?

- More personal than writing.
- Demands & retains attention.
- More immediate feedback.
- Quickly affects relationships.
- Creates an image.

BUT

- Is it the most appropriate medium ?
- Would a letter be better ?
- How important is this speed ?
- Are you reaching the right person?

DISADVANTAGES

- Lacks the non-verbal aspects of face-to-face communication e.g.
  - gaze,
  - expression,
  - gesture.
- Rx often unprepared.

SKILLS OF THE Tx.

- Develop positive attitude.
- Be prepared.
- How do you speak?
- Your manner.
- Using your voice.

Image creation - you can :-

- confirm an image of reliability, efficiency & courtesy.
- correct an image created elsewhere in your organisation.

CONSIDER THE Rx.

- Is Rx. hearing you clearly?
- Is this how they operate?
- Are you addressing the right person ?
  - Do they know what it's all about ?
  - Can they act ? Will they ?

USE OF VOICE

- Adds meaning through :- pitch; stress; inflection; timing; tone.

HOW TO SPEAK

- Into mouthpiece.
- Clear enunciation

MANNER

- Affects Rx's perception of Tx.
  - Efficient,
  - Polite,
  - Courteous, etc.
- Affects Rx's perception of the company.

A POSITIVE ATTITUDE

- You represent the company - be confident.
- Consider the Rx's perception of you.
- WRONG NUMBERS, was it
  - your error ?
  - changed No. ?
  - faulty apparatus?

NOT Rx's fault.

PREPARATION Have you :-

- Clear objectives ?
- All relevant information close at hand ?
- Know what strategy/ tactics to employ?
- Action plans - for Rx.
  - for Tx.

→ Where info.° collection is an important aspect of telephone work e.g. tele sales, bookings;
- ID. caller & use his name frequently.
- have you a set procedure for recording data ?

REDUCING COSTS

- "Will you hold on ?"
- 'Phone v. Letter (P.v.L.)
- Time of call.
- More efficient procedures.
- Reducing unauthorised calls.

WAITING TIME

- Ask how long. Seconds only.
- Get Rx. to call back at specified time.

P. v L.

- Can be cheaper than a business letter
- Instant feedback - quicker & more efficient than L.

TIME OF CALL

- A.M. - peak charges, possibly higher success reaching individuals.
- P.M. - standard charges, possibly lower success rate.
- Avoid - lunchbreaks; early a.m. (late in); late pm. (early home)
- Beware - differing time zones (E.E.C.)

MORE EFFICIENT PROCEDURES

- Reduces the need for :-
  - repeat calls,
  - follow ups.
- Missed calls. Their cost in :-
  - lost sales / contacts,
  - poor company image, P.R.
- Is your telephone always manned during working hours? → Use an answering machine or answering service.

REDUCING UNAUTHORISED CALLS

- Route outgoing calls through switchboard beginning "0....."
- Only dial out calls beginning "9....." (i.e. local)
- Compare estimate of cost of unauthorised calls with known cost of an operator's salary. Worthwhile?

PROCEDURES

- Tx - initiator
- Rx - facilitator
- Action Plans

Rx.

- ID. N.° / Extn, Org.°.
- ID. Self / function.
- Note info.° - incoming
  - outgoing
- Readback message / confirm action plan.
- Valediction

Tx.

- ID. Self & Dept.
- Reason for calling.
- Reference person, no.°, dates, etc.
- Business.
- Action plan.
- Valediction

ACTION PLAN

- Following this conversation - who does what? how? when? follow up? etc.

(ID. = Identify)

ORAL COMMUNICATION - LISTENING

* Good listening techniques.
* Bad listening ploys
* Avoiding listening
* Listening skills
* Rate yourself as a listener.

GOOD LISTENING TECHNIQUES
Questions or comments which focus on what was said.
- Request clarification.
- Restatement (paraphrasing).
- Neutral response.
- Reflective response.
- Positive response.

REQUEST CLARIFICATION
- To get additional facts.
- Helps explore all sides of a problem.

RESTATEMENT
- Shows you are listening & understanding.
- Checks your interpretation with the speaker.

NEUTRAL RESPONSE
- Encourages the speaker to continue talking.

REFLECTIVE RESPONSE
- Shows you understand how the speaker feels.

POSITIVE RESPONSE
- Summarising & bringing all the discussion into focus.
- Serves as a springboard for further discussion.

BAD LISTENING PLOYS
- To fake attention.
- To tolerate/create distractions.
- Get overstimulated & lose the point.
- Be thrown by emotive words.
- Switch-off to difficult expositions.
- Listen only for facts & not ideas.
- Criticise speaker's ability/prose/accent.
- Call the subject matter 'uninteresting'.
- Waste the differential between the speaking rate (120 w.p.m) & listening rate (400 w.p.m.)

Demotivates self, speaker & others.

LISTENING SKILLS
- Verbal skills eg.
  - use responses shown,
  - prompt with open questions.
- Non-verbal prompts eg.
  - with head nods,
  - note keywords to stimulate memory,
  - maintain eyecontact,

AVOIDING LISTENING
As indicated by :-
- verbal ploys
- non-verbal activities

PHYSIOLOGICAL CHANGES (IN LISTENER)
- Pulse rate increases.
- Breathing rate increases.

NON-VERBAL ACTIONS
- Avoiding eye contact,
- Bored expressions, yawning,
- Fiddling & fidgeting,
- Checking watches,
- Tidying papers, etc.
- Inattention.

VERBAL PLOYS
- Interrupting,
- Ridicule & nit-picking,
- Talking to another person,
- Argument
- Change the topic,
- Asking closed questions.

RATE YOURSELF AS A LISTENER
- Do you locate yourself to hear clearly ?
- Listen for feelings as well as words.?
- Disregard the speakers appearance.?
- 'Attend' as well as listen ?
- Allow for prejudice when evaluating the speaker ?
- Follow the topic continuously ?
- Stop listening when you think he's wrong ?
- Let others have the last word ?
- Consciously estimate the logic & rationality of the talk ?
- Consider another's viewpoint before replying ?

ORAL COMMUNICATION - SPEAKING

* Why is this skill important ?
* Prerequisites of good oral communication
* Comparison with written communication
* Important features in learning
* Used at work

WHY IT IS IMPORTANT

Research has shown ....

- Adults spend 70% of waking day in communication activities
- Managers spend about 50% of working day in oral communication

Writing 9%
Reading 16%
Speaking 30%
Listening 45%

with subordinates - 60%
with supervisors - 30%
with peers - 10%

PREREQUISITES

- Prepare your delivery.
- Prepare your listeners

for students/trainees :-
- to listen is sometimes more important than the ability to read. Listening means HEARING & UNDERSTANDING.
- provide the best conditions & motivate the listeners.

CONSIDERATION FOR LISTENERS

a. Speed of delivery & semantics.
Length of delivery & concentration spans.
Use of handouts etc to aid perception & memory.
Timing, spacing & developing points.
Idiosyncracies :-
- voice - accent/modulation/tone/inflexions/pitch/stress.
- self - expression/actions/posture/mannerisms/proxemics & orientation.

b. Physical & environmental conditions -
- audibility/acoustics/ambient noise.
- comfort - warmth/seating/lighting/ventilation.

USED AT WORK

- For briefing groups of about 1:20 .....
- Oral communication for immediate feedback, but
- Supplemented by paper for technical details, complex diagrams, statistics, etc.

Personal, oral	v Written Comm^.
• Requires presence of initiator to add sincerity, enthusiasm, integrity, honesty & confidence, etc.	• Permits revision of content before transmission for accuracy, correctness, etc.
• 'Build bridges' by added non-verbal elements e.g. gaze, gesture, intonation, dress, sex, etc.	• Covers greater distance & larger audience by duplication
• Instant feedback to modify the above.	• More precise, may be referred to.

FEATURES vis-a-vis LEARNING

- We speak at about 120 w.p.m.
  read at about 200+ w.p.m.
  listen at about 400 w.p.m.
- Don't waste the differential - the listener's mind is only party engaged. Supplement the oral input with visual displays to stimulate thinking activities.

QUOTATION

" COMMUNICATION doesn't mean 'talking'. It means listening first and then, maybe, talking. The only good communicator is a good listener."
Youngblood.

Listening Activity

- Record a good speaker at work e.g. Alistair Cook.
- Listen and note how he/they :-
  - vary the rate of delivery,
  - 'punctuate' the talk with pauses; asides; interjections.
  - get extra expression by modulation; stress; intonation.
  - 'paint' pictures in your mind with well-chosen words.

EFFECTIVE SPEAKING

* Planning a talk
* Giving a talk

PLANNING A TALK

- WHY do I want to speak to this audience ?
- WHAT do they expect to get out of it ?
- WHAT points do I need to put over ?
- HOW can these points best be put across ?

PERSONAL OBJECTIVES

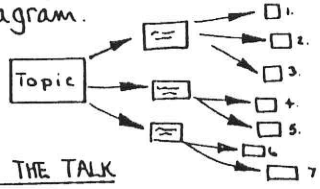
- What changes do I want ?
- Write your objective (in one sentence.)

AUDIENCE BENEFITS

- What benefits can they expect?
- Let them know what they will gain by listening - in your opening remarks.

CONTENTS

- Plan the format & content of the talk. Six-to-ten points only, any more will not be remembered.
- Plan your talk using a spider (keyword) diagram.



GIVING THE TALK

- Consider SELF.
- Consider THEM

CONSIDER YOURSELF

- Your enthusiasm & interest is infectious.
- Involve them by :
  - maintaining eyecontact,
  - encourage questions,
  - ask Q's,
  - abandon notes when possible.
- Nervousness implies you care. Prepare carefully

CONSIDER THEM

- Initially they are on your side.
- Don't insult them by:
  - poor presentation,
  - talking down to them.
- Don't baffle them with too much detail.
- Don't bore them with too little detail.

PLANNING THE TALK

- Structure.
- Aids to understanding.
- Preparation.

AIDS

- Microphones
- Handouts
- Films
- Models
- Pictures
- Experiments

[See S204/46 'Visual Material in Instruction']

PREPARATIONS

- Notes
- Admin^n

NOTES

- Use cards
- O.H.P. transparencies
- Keyword / spider diagrams concentrate details.
- Refer to them regularly but avoid reading your talk.

ADMIN^N

- Schedule / stage the preparations.
- Consider the venue.
- What "hardware" do you need (projectors, screens, blackouts, leads, plugs,)
- Do you need practice?

STRUCTURE THE TALK

- Beginning
- Middle
- End
- Questions.

BEGINNING

- Attract attention & explain audience benefits.
- Outline the talk :-
  - subject,
  - duration,
  - stages,
  - opportunity to question.
- Begin, keeping it simple & unhurried.

MIDDLE

- Pay attention to timing,
- Use aids if possible,
- Remember how slowly people absorb info^n aurally.

QUESTIONS

- Questions & discussion assist absorbtion.
- Allow time to formulate Q's.
- Involve audience if possible
- Keep to the subject matter
- When to allow Q's?
  - During ?
  - After ?

END

- Summarise your main points.
- Finish on a high note, key observation, very interesting, critical fact.

FILM - "THE FLOOR IS YOURS"
PAPERS :-
A 4 - Effective speaking
F 27 - Speech assessment form.
F 37 - Talk planning form.
F 38 - Talk feedback form.

EFFICIENT READING

* OBJECTIVES OF EFFICIENT READING
* READING MORE QUICKLY
* HOW TO PROGRESS
* NON-READING TECHNIQUES

OBJECTIVES OF E.R.
- Improve concentration & non-reading skills.
- Improve note-taking & memory
- Read more efficiently & effectively.

STARTING FACTS :- You only 'see' when the eye is still. 'Fixations' may take 1/100 sec. A 'span' of words clears the brain in about 1/5 sec. You 'read' a span for meaning & understanding.

READING MORE QUICKLY
There are two ways to do this :-
- Rapid reading techniques
- Effective reading techniques

- This means better comprehension & retention of factual matter.

RAPID READING SKILLS
- Acquire non-reading skills.
- Develop new reading habits.
- Regular (daily) practice.

⇨ Rapid reading.

- Know the way your eyes function.
- Understand the way texts are constructed.
- Know why you are reading.
- Decide what to read
- Decide how to read.
- Acquire non-reading skills.
- Improve your organisation

- Conversely, decide what NOT to read.
- No change in reading speed but you move faster & more effectively.

HOW TO PROGRESS
- Previewing to prepare the mind & categorise material
- Decide your INTENTION
- Decide your ATTITUDE

ATTITUDE
- Have you an intention to remember ?
- Is your mind open / closed to what you expect to read ?
- Are you motivated ?
  - why read it ?
  - how to read it ?
- Is the task realistic ?
  - Break it down.
  - Set personal targets.
  - Reward yourself at end.

Skim & assess :-
- Important, read thoroughly.
- Less so, skim & file / pass on.
- Unimportant, reject & discard.

INTENTIONS will you read it &....
- file the copy for future use ?
- be questioned on its contents ?
- write about it ?

To some extent this decides your MOTIVATION & reading STYLE ⟶ **STYLE / TECHNIQUES**
- Skim,
- Scan,
- Slow read,
- Fast read.

NON-READING TECHNIQUES
- Understand text construction.
- Use an index
- Use SQ3R plan
- Be comfortable & alert.
- Organise the material.
- Organise yourself.

SQ3R
- Survey.
- Question.
- Read.
- Recall.
- Review.

Use of an index
- helps control eye mov'ts.
- eases strain.
- aids concentration.
- peripheral distractions reduced.

At work - reading document after document without a break or writing Q's & A's
⇨ details quickly erased from S-term memory.

COMMUNICATING INSTRUCTIONS

HOW CAN INFORMATION BE COMMUNICATED?

* word
* picture
* action

Words alone

* prose, suitable if the message is very simple &/or the audience is used to reading instructions.
* spoken/recorded speech, by itself is hard to recall. Supplement by visual aids & exercises.

Words & Diagrams

* Algorithms, communicate through a series of simple questions and lead to a prescribed action. Laid out as a flowchart.
* Networks, a graphical representation of the logic of a group of connected activities.
* Gantt charts, show the relationships in time of a group of connected activities.
* Business charts, may use a variety of devices to make numerical info? easier to absorb. (eg. pies, bars, columns, lines, etc.)
* Decision tables, present answers to questions in table form and suggests actions.

Pictures & Models - may be used
- to generate interest.
- to make a reader/listener more aware of the size or form of a thing.

See papers:
A 31 - Network analysis
A 106 - Report writing
A 107 - Choice of words
A 299 - Algorithms
A 378 - Comm.^{g} Complex Inst.^{n} Training Design Algorithms

Action & Practice

* Exercises
* Simulation
* Heuristics

EXERCISES & GAMES
- designed to practice the man in the in the skill to be taught.

GAMES
- designed to simulate real life conditions and create stress.

SIMULATION
- mechanical,
- electronic,
- paper,

} a group of techniques for constructing models of real life situations.

To communicate the **effects of a set course of actions**

HEURISTICS
- a process of discovery by trial & error when a complete systematic solution is too complicated.

COMMUNICATION & MOTIVATION

* Methods of communicating
* Communicating styles
* What should be communicated ?
* Barriers to communication
* How to avoid these barriers

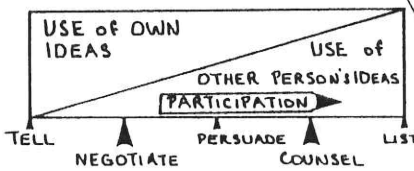
METHODS OF COMMUNICATING

- Words (10%); Tones (40%); Visual (50%)
- Writing; telephoning; meeting people
- Reading; listening & observing

COMMUNICATING STYLES

- Tell.
- Negotiate.
- Persuade.
- Counsel.
- Listen.

CONTINUUM OF COMMUNICATING STYLES



WHAT SHOULD BE COMMUNICATED ?

- Facts
- Feelings

BARRIERS TO COMMUNICATION

- Cross cultural barriers.
- Stereotypes & myths.
- Misinterpretation & selection.
- Lack of trust.

LACK OF TRUST

- When trust is broken, communicator is rejected.
- Trust may be broken by not giving enough infor" or giving wrong information.

MISINTERPRETATION & SELECTION

- When a person listens inefficiely, the communication is not heard.
- When a person has a bias, they listen selectively & hears what they want to hear.

STEREOTYPES & MYTHS

- When a listener does not hear, they 'invent' from previous experience or forms ideas to fit their stereotype of the situation.

CROSS CULTURAL BARRIERS

- Listener interprets behaviour according to his "culture".
- Different groups, classes, races, sexes have their own "cultures".

FACTS

People's action's are affected at least as much by :-

- Political factors
  - power & influence,
  - status & appearance,
  - need for control, &
- Personal factors
  - hopes & fears,
  - beliefs, attitudes & values,
  - perceptions & objectives,

as they are by the requirement to :- produce goods, &/or provide a service.

FEELINGS

- Norms
- Problems

PROBLEMS

Problems, issues & conflict are very often caused by perceptions & subjective feelings rather than factual evidence.

NORMS

NORMS - a "norm" is an assumption held by a person concerning the behaviour which is, under certain circumstances, to be considered

- good / bad,
- right / wrong,
- allowed / not allowed,
- appropriate / inappropriate.

- Frequently a "group norm" will prevent / hinder
  - the expression of feelings
  - the recognition of feelings,
  - the enquiry into feelings.

HOW TO AVOID THESE BARRIERS

- By listening
- By being open
- By confronting

LISTENING

- Paraphrasing - feeding back what is "heard".
- Positive response - saying why you like the idea first.

BEING OPEN

- Role model - behave "authentically."
  - others know how you feel.
  - others copy how you behave.
- Grapevine. This is never charitable, "there must be a reason why we haven't been told."

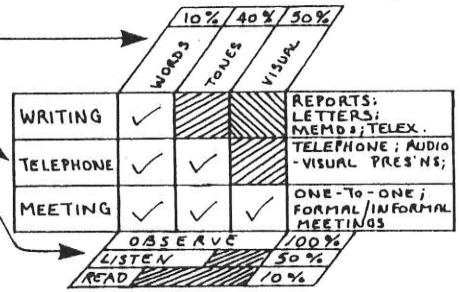
CONFRONTING

- Action Research - what is wrong with the organisation ?
- Intergroup Interventions - how does each group perceive the other ?
- Non-directive Interviewing - what is bugging people ?
- Johari Window - what do you know about yourself ?
- Team building & Problem solving - how do we, as a group, solve our problems ?

COMMUNICATING & MOTIVATING

- Communicating = Sharing of information, attitudes & feelings.
- Motivating = Doing something because you want to.

Communicating & motivating :-
= Helping someone to want to do something
= Stopping someone from not wanting to do something.



PAPERS :-
A18, A109 - Comm" & Activation.
A328 - Behavioural Communication.
A329 - Listening.
A396 - Action Prg. Planning Techniques.
A662 - Johari's Window.
A680 - Factors hindering Eff. Comm".

COMMUNICATIONS IN AN ORGANISATION (SUPERVISOR'S ROLE)

- ✳ WHAT PROCESSES ARE AT WORK ?
- ✳ SUPERVISOR'S RESPONSIBILITIES
- ✳ MANAGER'S INFORMATION NEEDS
- ✳ WHY KEEP RECORDS ?

COMMUNICATION PROCESSES

- Chain of command
- Written word
- Representative system
- Informal work groups
- Grapevine

CHAIN OF COMMAND

- Reportability (using the right channels)
- Briefing groups
  - too many levels .... ►► distorted messages.
  - too many people reporting ►► 1-way communication.

WRITTEN WORD

- Notices; letters; memos; forms; records; etc.

►►.. impersonal; 1-way comm^n.; not always understood (or read), best as a record of the spoken word.

REPRESENTATIVE SYSTEM

- Union reps.; staff association rep.; informal spokespersons; etc.....

..... sometimes biased (wanting to please boss or group); one way communication as group are unable to attend.

GRAPEVINE

- Always uncharitable, wanting to please the listeners.
- Strong, where mgt. comm^ns is weak.
- Weak, where mgt. comm^ns is strong.

INFORMAL WORK GROUPS

- Identify who & where they are.
- Inform & discuss with them all.

RECORD KEEPING

- Records are kept for:
  - information required by law,
  - information for decision taking,
  - information about staff.
- Sorts of records, information on:
  - output & quality,
  - costs & expenditure,
  - absenteeism & lateness,
  - health & accidents,
  - stocks & stock movements,
  - orders placed & outstanding,
  - prices quoted,
  - salary progressions & promotions,
  - discipline breaches & warnings,
  - staff appraisals & action plans,
  - etc.
- Meetings - agenda, minutes & actions.
- Appointments.

(Use log books, notebooks & diary.)

SUPERVISOR'S RESPONSIBILITIES

- Be interested in each staff member.
  - know them & about their families,
  - their problems & abilities,
  - make allowances,
  - use their strengths.
- Link 'staff' & 'company'; top mgt. to 'workers'.
  - interpret policy & decisions & actions.
  - use discussion; question & answer.

SPECIFIC RESPONSIBILITIES (For Comm'ns)

- Induction training
- Job clarification
- Daily contact
- Staff meetings
- Notice boards

NOTICE BOARDS

- Keep them tidy & up-to-date.

STAFF MEETINGS

- Pass on information.
- Discuss plans & changes.
- Review performance.
- Discuss problems.

DAILY CONTACT

- Standard setting.
- Show appreciation.
- Give guidance/criticism.
- Sort out problems.

JOB CLARIFICATION

- Terms of reference; responsible for/to.
- Targets; what/when.

INDUCTION TRAINING

- Company briefing - ownership; structure; etc.
- Geography briefing - where to go for what.
- Procedure briefing - how to get it.
- Service briefing - where to get help.

MANAGER'S NEEDS

Upward communication of :-

- People problems eg.
  - feelings, reactions, ideas, problems,
  - suggestions for change.
- Work problems eg.
  - project progress reports,
  - exceptional events → 'Management by Exception'
  - completed jobs,
  - deviations from plan/budget,
  - anticipated problems,
  - suggestions for work improvements.

BEHAVIOURAL COMMUNICATION

* Why observe behavioural communication ?
* What behaviour is significant ?
* What conclusions may be drawn ?

PAPERS :-
A328 - Behavioural Communication
C445 - Body Language

WHY OBSERVE ?

- To get the full communication
- To know what to say
- To know how to interpret words
- To understand yourself

FULL COMMUNICATION

- Comes from .....
  - Words 7%
  - Tones 38%
  - visual 55%

WHAT TO SAY ?

- Are they listening ?
- Do they want ideas ?
- Are they understanding ?
- Are they learning ?
- Will they do what you want ?
- Do they want feedback ?

SIGNIFICANT BEHAVIOUR

- Bodily contact & physical position
- Bodily orientation & gestures
- Tones of voice
- Clothes & physical appearance
- Facial expression & eye movements

HOW TO UNDERSTAND YOURSELF

- By observing your own behaviour you can understand & question your own emotions & attitudes.

HOW TO INTERPRET WORDS

- What is their emotional state ?
  - anxious ; frightened ; hurt ; tense ;
  - annoyed ; disgusted ; angry ;
  - pleased ; happy ; relaxed ; elated ;
  - surprised ; depressed ; etc.
- What is their attitude to you & others ?
  - helpful ; friendly ; intimate ;
  - dominant ; polite ;
  - cowed ; passive ; furtive ;
  - aggressive ; assertive ;
  - curious ; etc.

CONTACT & POSITION

- Notice the effects of :-
  - pushing or pulling someone,
  - shaking hands or not shaking hands,
  - kissing on meeting,
  - proximity - moving close to discuss something,
  - being in a dominant position
  - facing from behind a desk or no desk.
  - standing whilst another sits.
  - key positions in a group or at a meeting.

FACIAL EXPRESSIONS

- Shown by movements of
  - eyes,
  - eyebrows,
  - mouth

Genuinely or superficially giving frowns, smiles, etc.

CLOTHES & PHYSICAL APPEARANCE

- Wanting to attract attention.
- Not caring about appearance.
- Smart.

TONES OF VOICE

- Voice quality
  - loudness v. softness,
  - pitch - high or low,
  - speed - fast or slow,
  - smoothness, breathlessness,
- Silences or interruptions
  - hesitations,
  - repetitions,
  - interruptions,
  - being interrupted

BODILY ORIENTATION & GESTURE

- Notice the significance of bodily orientation
  - facing v. sitting next to.
  - keeping v. avoiding eye contact.
  - looking down v. ahead.
- Gestures
  - head nods & shakes.
  - wagging foot.
  - crossing / opening arms
  - hand movements
    - pointing,
    - clenching,
    - holding.

CONCLUSIONS

- Cultural groups have their own accepted behavioural language.
- Behaviour can be modified to mislead,
  - by disguising real feelings,
  - to be more acceptable.
- Interactions takes place at two levels,
  - carefully planned acceptable words & behaviour.
  - subconscious behaviour which can be interpreted to give the authentic message.
- Increasing observation can greatly increase your ability to :-
  - 'listen' to others,
  - help others,
  - understand yourself.

ALGORITHMS

- * What is an ALGORITHM ?
- * Why use algorithms ?
- * Advantages of algorithms
- * How to design them ?
- * Where are they used ?

DEFINITION :-

- An algorithm is an orderly series of instructions for solving a problem.

WHY USE ALGORITHMS ?

- To make complicated instructions clear & easy to understand.
- To make instructions easier to read & understand.
- To motivate people to read instns
- To enable less well qualified operatives to make decisions formerly made by higher staff → less need to defer decisions or refer decision making
- Always the right answer according to information input.
- Reduces potential for argument or disagreement.

ADVANTAGES :-

- To user.
- To compiler.

Advantages to user :
- Less work to do.
- Less misinterpretation.
- Easier to remember procedures.
- Easier to check instructions.
- Work / reading more relevant.

Advantages to compiler :
- Forced to think clearly.
- Forced to consider all eventualities.
- Shows up ambiguity, loopholes & obscure instructions.
- Easier to translate.

HOW TO DESIGN THEM

- Do you want it all on one page ?
  - Subchart on 1st page deals with the case if no snags.
  - Further subcharts to deal with complications
- How to prevent confusion.
- Can you shorten them?
- How to layout an algorithm

Layout :
- Observe common conventions for shapes of boxes with Q's & instns
- Which Q's covers the commonest case ?
- Which Q extracts the most information ?
- Be 'fair' & reasonable in the number of Q's to be answered.
- Make it neat & attractive.
- Seek good examples to copy.

Prevent confusion :
- Try to use simple, closed questions with YES / NO answers.
- Break instructions into simple stages.
- Use 'EXPLICATED' algorithms → 'EXPLICATED' algorithms contain extra narrative so preventing error & motivating the reader.

Shortening algorithms :
- Have fewer operations – risks loss of understanding.
- Cover major contingencies & eventualities only – others may be covered by discussion.
  - may lead to wrong answers.
  - don't shorten dangerous operations.

WHERE USED ?

- Fault finders eg. T.V., car mechanics.
- Consumer magazines eg. Tax guides, etc
- Local Gov't & Health Authorities to simplify legislation, rating, etc.

PAPER :- A299 - Algorithms

SPIDER DIAGRAMS (KEYWORDS)

* WHAT IS A SPIDER (KEYWORD) DIAGRAM ?
* HOW TO DRAW A SPIDER DIAGRAM
* DEVELOPING IDEAS USING SPIDER DIAGRAMS
* TAKING NOTES USING SPIDER DIAGRAMS

WHAT IS A SPIDER (KEYWORD) DIAGRAM ?

- A spider diagram is a diagram...
- Showing interconnecting thoughts....
- On a 2-dimensional plan....
- Using KEYWORDS rather than sentences... or short phrases....
- In order to - record ideas,
  - recall ideas,
  - build on ideas
  - sort thoughts logically.

PAPERS :-
A 31 - NETWORKS
A 299 - ALGORITHMS
A 456 - DECISION TREES
C 132 - DECISION TREES
C 176 - ALGORITHMS
C 246 - PROBLEM TREES
C 349 - PROBLEM TREES

Use large sheets 11½" × 16½" or "liquid paper" - computer printout sheets.

TAKING NOTES USING SPIDER DIAGRAMS

- How ?
- When ?
- Where ?
- Why ?

WHY USE SPIDER DIAGRAMS ?

- To improve absorbtion.
  - Greater concentration,
  - More time to listen.
- To help recall.
  - Their 'shape' aids memory,
  - Expand the notes later.
- To summarise.
  - For revision,
  - For communication.

WHERE TO USE SPIDER DIAGRAMS ?

- During lectures or discussions.
- At meetings or interviews.
- When reading or listening to radio.
- When watching T.V. or films.
- When thinking & planning

WHEN TO USE SPIDER DIAGRAMS ?

- At the 'event'.
- After the 'event', the sooner the better to recall ideas & to reinforce memory.

HOW TO TAKE SPIDER (KEYWORD) DIAGRAMS ?

- Record ideas as keywords only.
- Link ideas with lines or arrows.
- Put associated ideas near each other.

IN/OUT LISTENING

- Record subject matter = IN listening.
- Record 'stray ideas" = OUT listening.

(This stops the mind wandering & ideas from getting lost.)

DEVELOPING IDEAS USING SPIDER DIAGRAMS

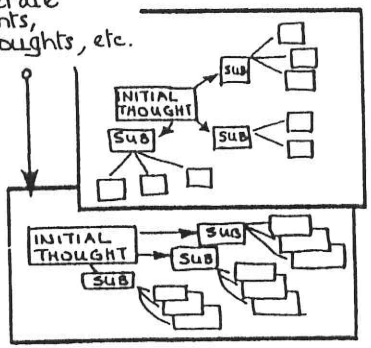
- Each idea triggers off associated ideas in the brain.
- Record ideas on the spider diagram & link to associated ideas.
- Ideas in different areas take different times to germinate so record ideas near to the associated idea.
- Redraw the spider (keyword) diagram - if it becomes too confused
  - to resort the logic of thoughts,
  - to communicate ideas to others.

Use to prepare ideas for :-

- Problem solving (problem & logic trees).
- Planning processes (networks).
- Specifying action to take (algorithms).
- Lecture/lesson preparation.
- Letter & report writing.
- Individual brainstorming.

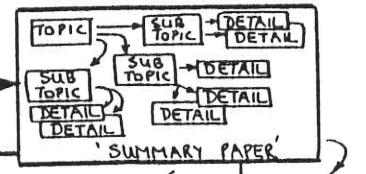
HOW TO DRAW A SPIDER DIAGRAM

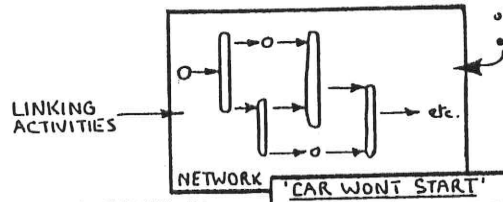
- Record your initial thoughts → headings & subheadings, headings & questions.
- Record subsidiary thoughts & link with lines or arrows.
- Clarify the subsidiary thoughts or continue to generate
  - subsidiary thoughts,
  - sub-subsidiary thoughts, etc.

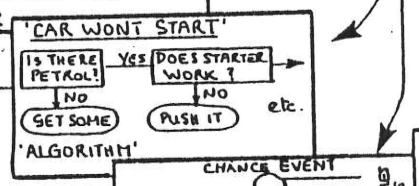


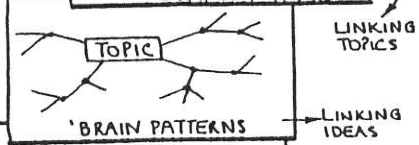
DIFFERENT STYLES/ TYPES.

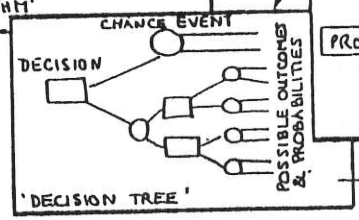
- Summary Papers.
- Brain Patterns.
- Problem Trees.
- Decision Tree.
- Algorithms.
- Networks.

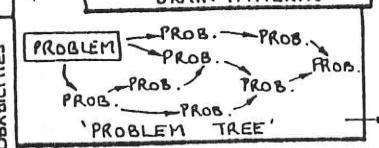












LINKING DECISIONS & RESULTING CHANCE EVENTS

THINKING (after de Bono)

* Thinking & thinkers
* Avoiding thinking
* Thinking & Decision Making
* Action directed thinking
* Planning

THINKING & THINKERS
- Thinkers - take confusion & uncertainty & seek patterns.
- 'CONFORMIST' thinkers → follow established patterns and rules
- 'CREATIVE' thinkers → have their own special perspectives of a situation (but may themselves be inflexible.)
- 'LATERAL' thinkers → may change perspectives at will. switch patterns within patterned thinking (movement). use a 'provocation' statement to assist movement from pattern to pattern.

THINKING - takes place in the MIND (an active, self-organising information processing system.) It is determined by emotions, feelings & values & may be seen as a discipline with skills, disciplines, etc.

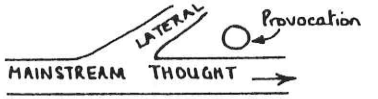
AVOIDING THINKING
- Relying on attitudes & beliefs as a substitute for thinking

ATTITUDES
- Prelude thinking by shortening the perception phase during interpretation of a situation.
- Permits faster response to stimuli from situations eg. medicine - YUK! Irishmen - daft.

DECISION MAKING
- Only applies when info° is incomplete.
- The value of the decision can only be checked in the future
- Choosing alternatives

If you have complete information, decision making is unnecessary, follow routines. → We think to get information; we use information to think.

PROVOCATION to :-
- step outside the judgement system.
- escape from the boundaries of 'taken for granted.'
- provides random stimulation.



ACTION DIRECTED THINKING include
- Setting up procedures & routines
- Goal directed behaviour
- Reaching objectives.

More flexible; starts from anywhere; effective with higher calibre operatives.

Lacks flexibility but effective with low calibre operatives.

Establish sub-objectives; Establish 'strategies'; overall intentions & 'tactics' i.e. short-term reactions or movements

'easy way out' - the easiest alternative.
'paired comparisons' - to find the best alternative.
'dice method' - make any decision & be happy with it.
'abandoning an attractive alternative.'
'ideal solution' - generated alternatives set aside to discover the ideal solution.
'best home' - generated alternatives compared to see what is the best 'fit' for this actuality.
'what if.....' generate alternatives then focus on imponderables 'what if' to aid decision making.

PLANNING is too often a summary of the past, not a design for the future.
HINDSIGHT recognises the reasonableness & obvious retrospectively.
INSIGHT recognises the reasonableness & obvious from pattern switching.

PLANNING consider
- The terrain → Features of the future.
- The people → How do you motivate, delegate, communicate, instruct, etc.? Will they help or hinder? What are their motivations?
- The risks
- The constraints → Legal, market, materials, etc.

BETTER THINKING (after de Bono)

* Better thinking
* Barriers to better thinking

BETTER THINKING
- Be deliberate
- Be focussed/targetted
- Be confident
- Be disciplined

- Let it be a conscious activity.
- Used at will.
- Directed at specific subject matter.
- Use recognised techniques.

- In explorative or creative thinking focus on the subject matter & let the mind wander.

or Determine to do it, instruct yourself & then do it – focussed on a specific subject task. No wandering permitted.

See thinking as –
- an operating skill,
- make mistakes & learn from them,
- find new ways of looking at things.

- Set time limits to improve focussing.
- Write down subsequent thoughts to improve harvesting of ideas
- Conclude a contract for action.

BARRIERS TO THINKING
- Emotional points
- Negative overstimulation
- Recurrent ideas.
- Value laden stimuli
- Personal feelings

Personal feelings
eg. jealousy, alters thinking & perceptions. Contentment with an 'adequate' solution blocks search for alternatives.

Value laden stimuli
Emotive words & statements alter perceptions.

- Avoid words with negative values e.g. sly, superficial, etc.
- Use instead words with positive values eg. creative, honour, justice, good, etc.

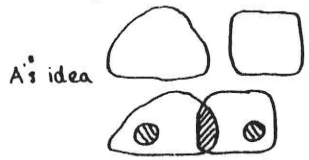
'Values' link events & emotions

Events ← VALUES → Emotions

and may alter perceptions.
- Me-values (ego; status; survival; pleasure; etc.)
- Mates-values (belonging; loyalty; support; etc.)
- Moral-values (social; the law; etc.)
- Mankind-values (ecological; human rights; etc.)

EMOTIONAL POINTS
Determined by emotions feelings & value judgements.

NEGATIVE OVER STIMULATION
- Negative criticism is an easy form of activity → immediate sense of superiority & achievement.
- Proving another wrong does not prove you are right.
- Ideas may be 90% good 10% bad. To be negative & stress 10% ignores the 90%.



Develop areas of agreement, not areas of disagreement or areas of irrelevance

RECORDING use
- Keyword diagrams,
- Spider diagrams,
- ISHIKAWA (fishbone) diagrams.

& network diagrams for sequencing.

TECHNIQUES
- Abstract patterning.
- Lateral thinking.
- Situation analysis.
- Reviewing
- Designing

Freer than problem solving, we create something to achieve a purpose.

Looking at a system which is not a problem; → making a judgement.

- To criticise destructively is negative.
- To explore is neutral.
- To expand constructively is positive.

A's perception differs from B's due to :- circumstances, relationships, & experiences.

NEGOTIATION :- is pressure bargaining in area ▨ & communication must be in the language of the receiver.

ASPECTS OF LEARNING TECHNOLOGY

* The Learners
* What to communicate
* What methods to use?
* What support materials?
* Personal skills

THE LEARNERS
- What are their needs ?
- Where is their study base?
- Who are they ?
- Are they learning ?

Assess their NEEDS by
- appraisal,
- counselling,
- needs analysis.

Study base :-
- home (distance learning) implies limited technology available.
- college (traditional) implies wider technology available.
- workplace ... (conditions conducive to l'ng?)

Check :- pre-learning abilities / post-learning abilities ⟲ feedback

YOUR COMMUNICATIONS
- What do you want to achieve?
- How will you achieve it ?

Have you :-
- behavioural objectives ..... → to influence/change behaviour patterns.
- affective objectives ..... → to change attitudes.
- cognitive objectives ..... → to impart knowledge.
- to develop motor skills?

How to achieve it ?
- by reading - (19th century belief).
- by example ..... → yours or others'?
- by discovery methods .... → employing manuals & instructional books, etc.
- by contact & interactive methods ... → syndicate work, role play, exercises, case studies ..... work experience becomes a learning experience.

WHAT METHODS ? Choose from :-
- Training (coaching).
- Action Learning. (see 204k)
- Quality Circles.
- Problem-solving/brain storming

PERSONAL SKILLS
- Presentation skills
- Use of materials
- Use of o.h.p.
- Use of seminars

SUPPORT MATERIALS
- Hardware.
- Software.
- Learning packages.

LEARNING PACKAGES

Complex instruments requiring
- precise objectives,
- assessment procedures,
- (+) tutor contact.

Time consuming to produce but satisfying to use. Very high ratio of time in prep^{n} : time to work through them.

Software
- Recordings .... live/off-air/ disc - who makes them?
- Paper-based ....
  books/handouts;
  cassette & book;
  charts & pictures;
  texts & packages.

Hardware
- Sound/noise production .... → cassette/open reel/record players.
- Image projection ..... → moving or still?
- Computers .... → self-pacing, but time consuming
- C.C.T.V. ..... → (complex - value for money ?)

attention-seeking & motivating

USE OF VISUAL MATERIAL IN INSTRUCTION

* Why use visual material ?
* Focussing attention.
* What is/is not visual ?
* Consider the viewer
* How are they displayed ?

WHY USE VISUALS ?
- upto 75% info^n received through eyes.
- to reinforce the spoken word.
- supplement & support aural input
- offers KEYWORDS & concepts
- improves memory of the details

- to link with your objectives.
- to relate with your talking at the time of showing.

NOT wallpaper, extended exposure reduces impact.

Important to use this channel to the brain.
CARE - can also distract.

FOCUSSING ATTENTION
- Not too much information
  - don't confuse with detail or they 'switch-off'
  - may contain information irrelevant at that moment.
- Direct attention to key ideas
  - by using colour
  - by boxing or underlining
  - by pointing
  - by humour

WHAT IS VISUAL ?
- Simple diagrams
- Pictures
- Keywords

- Lists
- Prose
- Quotations.....

ARE NOT VISUAL !

CONSIDER THE MATERIAL
Is the information....
- sequential ?
- showing relationships ?
- in context ?

Are you using visuals...
- to gain attention ?
- to motivate audience to learn & make decisions ?
- to present facts, concepts & information in a structured & effective form.

CONSIDER THE VIEWERS
- Consider the process of learning
- Will they be bored/ overwhelmed ?
- Can they read/ understand diagrams ?
- Avoid abbreviations & jargon unless you know they understand.
- What other support material is needed ?
- What is expected of them

PROCESS
- Reception, of info^n
- Perception, recognition & linking with existing knowledge
- Understanding

- take notes,
- enter dialogue,
- some other activity.

CRITERIA
- clear & readable
- visual
- relevant
- has a clear objective

are the viewers used to such presentations ? Are you being totally professional ?

HOW ARE THEY DISPLAYED ?
- On a writing surface
- On a support surface
- With a projector

chalkboard (not permanent)
flipchart (easily damaged)
ohp roll or acetate

felt boards
magnetic boards
peg boards
plasti-graphs
display boards/stands
tables → for realia & models

- still images
- moving images

c.c.t.v.
8mm/16mm film
film loops

o.h.p.
35 mm slides
film strips

Support material ?
Handouts related to the aural input will improve retention

CHINESE PROVERB

I hear & I forget,
I see & I remember,
I do & I understand.

MAKING A PRESENTATION (PREPARATIONS)

* Forward planning
* Consider the venue
* Support materials

FORWARD PLANNING :-

- Academic aspects
- Logistical aspects

ACADEMIC CONSIDERATIONS

- Format will be ..... lecture,
  ...demonstration,
  ..discussion, etc ?
- Structure – opening
  – body
  – closing summary
- Student/audience participation
  – during
  – follow-up

Pre-testing & post-testing ?

LOGISTICAL CONSIDERATIONS

- Preparing/duplicating handouts.
- Providing/preparing visual materials.
- Ordering/films/video tapes/recordings
- Providing hardware
- Checking compatibility of software with hardware.

THE VENUE :-

- Size vis-a-vis audience
- Facilities required
- Location

Car parking
Accessibility

FACILITIES

- Public address system?
- Mains power supply ?
- Lectern & podium?
- Display & working surfaces?
- Furniture – seating (comfort, tiered.)?
- Environment
  - Heating
  - Lighting
  - Ventilation
  - Noise/disturbance free
- Blackout & screens ?
- Power extension cables ?

SUPPORT MATERIALS :-

- Realia
- Projected images
- Software
- Hardware

REALIA

- Exhibits
- Models
- Pictures

PROJECTED IMAGES

- Still images from
  - o.h.p., episcope, 35mm.
- Moving images from
  - 8mm, 16mm, 35mm film
  - film loops
  - video, C.C.T.V., T.V.
- Sound images
  - radio, music, noises, etc. (off air/recorded)

SOFTWARE

- o.h.p. pens, rolls, acetates.
- Films or videotapes.
- Chalk & cleaning materials.
- Flipcharts & pens.
- Pointers

HARDWARE

- Chalkboards
- O.H.P.
- C.C.T.V. apparatus
- Film/filmloop projectors
- Tape recorder – cassette or open-reel
- Record player

MAKING A PRESENTATION (CONSIDERATIONS)

* Consider your role as communicator (Tx)
* Consider your audience (Rx)
* Consider the venue & support technology

ME - THE TRANSMITTER (Tx)

- Why me ?
- What format to use.
- Techniques for building bridges.
- Presentation skills.
- Am I communicating ?
- What am I 'selling' ?

WHY ME ?

- The best person ?
- Most knowledgable person?
- Best presenter ?
- Only person available ?
- No choice !

.... So what are my objectives for doing this ?

FORMAT

- Lecture
- Discussion group
- Seminar
- Coaching
- Practical / Demon^n.

..... which is best, in view of
- group size
- time available
- space / resources available
- efficiency as a mode of learning

BRIDGE-BUILDING TECHNIQUES

- Voice ..... tone / inflexions
  calm & steady
  Modulated, with pauses.
  NOT too loud / too soft
  too fast / too slow
- Gaze ..... maintain eye contact, & smile to imply warmth & sincerity. Non-verbal ploys aid communication & feedback
- Gesture .... use of hands & arms to indicate & emphasise. Adds to animation
- Posture & orientation .... may reinforce confidence & sincerity.
- Mannerisms .... can distract & annoy.

AM I SELLING ....

- my subject (ideas) ?
- my materials ?
- me, as a person ?

Are they assessing me?
Should they assess me ?
What might they assess ?

AM I COMMUNICATING ?

How can I tell ?
- Pre-testing & Post-testing
- Set assignments
- Visual feedback
- Verbal feedback
- Questionning & inviting questions
- Atmosphere, is it receptive / hostile ?

PRESENTATION SKILLS

These include ....
- Use of apparatus
- Put listeners at ease
- Know the audience
- Controlling nerves
- Careful preparation → Know your subject. Software preparation. Prepare a plan, notes. Summarise. Timing.
- Don't try & 'con' them.
- Posture

POSTURE

Will you be ....
- Sitting, limited movement & inanimate
- Standing, more interesting & lively. Easier to use visual aids & apparatus.

THE AUDIENCE - THE RECEIVERS (Rx)

- Why them, who are they ?
- What are their expectations ?
- What do you expect ?

YOUR EXPECTATIONS

- What of their minds ?
  closed / open
  receptive / interested
- Their capability to listen & to participate
- Participation (active/passive)

THEIR EXPECTATIONS

- What do they want ?
  entertainment, information, reinforcement, educating, professional presentation, participation (passive/active)
- How do they see you ?
  representative / expert / specialist / mouthpiece

WHO ARE THEY ?

- Volunteers / 'pressed' ?
- Friendly / hostile ?
- Superiors / peers / students / subordinates
- What is the level of their existing knowledge ?

IMPROVING THE EFFECTIVENESS OF LECTURES

* Is lecturing the best method for the learners?
* Can you vary your presentation?
* Do you know your audience?
* Organising & planning the lecture content.
* Assist the understanding.
* Physical considerations.

WHY INEFFECTIVE?

- Usually a 1:many situation.
- Mainly a 1-way communication.
- Lacking feedback from listeners.
- Group pressure is strong.
- People can 'hide' in a large audience.

∴ EXAMINE ALTERNATIVE PRESENTATIONS!

Watch faces for signs of:
- interest,
- understanding,
- lack of u-standing,
- attending,
- boredom,
- acceptance,
- hostility, etc.

(Non-verbal signs)

Lecturer cannot:
- ask Q's of everyone,
- check understanding,
- ensure learning has taken place.

Group Pressure suppresses :-
- questions,
- comments,
- participation,
- verbal feedback,
- admissions of not understanding.

VARY YOUR PRESENTATION

- Create interest by :
  - using demonstrations,
  - using visual aids,
  - varying voice speed tone & pitch,
  - be mobile/animated,
  - build-in thinking or other activities.

PHYSICAL CONSIDERATIONS

- Length of lecture.
- Time of day.
- Day of week.
- What have they just been doing?
- Are they comfortable?
- Can they all :-
  - hear clearly?
  - see clearly?
  - write easily?
- Can you prevent fatigue?
- Any other distractions?

Distractions
- Ambient noise,
- Movements,
- Misuse of V.Aids,
- Your mannerisms,
- Class 'characters'.

How will you handle :-
- the 'know-all'?
- the 'disruptive influence'?
- the difficult questions?
- the inattentive student?
- etc.

Check :-
- Seating,
- Lighting,
- Temperature,
- Ventilation

KNOW YOUR AUDIENCE

- What is their existing knowledge?
- Have they receptive or closed minds?
- Are you pitched at the right level?
- Are they used to working like this?
- Are they friendly or hostile?
- Are they conscripts or volunteers?
- What do they want/expect?

Not too easy.
Not too hard.

ASSIST UNDERSTANDING

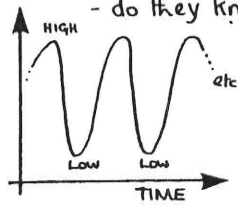
- Pace the delivery.
- Provide handouts.
- Use visual aids.
- Use drama.

You are your best visual aid .....therefore be :-
- enthusiastic,
- friendly,
- audible,
- concise,
- active.

Be expressive, use :-
- gesture,
- facial expression,
- choice of words,
- body language,
- acting,
- voice projection.

PLANNING & ORGANISING

- What are your objectives? → Behavioural, affective, cognitive.
- Is the subject matter concrete or abstract? → Can they receive it? Can they perceive it? Can they visualise it?
- How many points to make?
- What do you want them to remember?
- What are they likely to remember? → The last 15 mins.
- How much explanation is required?
- How long will you take?
- Student's role - active or passive?
- What have they to do? → What have they to do?
  - listen; watch; take notes; answer questions?
  - do they know what is expected of them?
- How does their attention vary with time? → ATT^N



REMEMBER

- The audience is usually on your side - initially.
- Convince them of the benefits of attending.
- They won't notice good blackboard/projector techniques - only bad techniques.

ACTION LEARNING (OPERATING FEATURES)

* Who is involved ?
* Underlying assumptions
* Functions of the A-L set
* Set advisers role
* Pre A-L beliefs
* Reflection & Learning

WHO IS INVOLVED ?

- The client
- The Set Adviser
- The participants

THE CLIENT could be
- the organisation,
- the participant's boss,
- persons with authority....

to sustain the participant & who permits work time to be devoted to the project. Also someone to support, encourage & generally take an interest.

SET ADVISER
- Usually an outsider.
- Needs trust & confidence of client & participant.
- NOT the group leader or teacher.
- Possibly a facilitator

Occasional inputs to broaden range of ideas open to set members. Arrange talks with specialists as requested by the set.

PARTICIPANTS (upto 8)
- Has authority to attend.
- Has authority to carry out & manage his project.

ASSUMPTIONS

- Learning accrues from ACTION in real situations.
- Learning & understanding come from reflection.
- Learning can happen in the company of others who are also learning.
- One's actual work situation is the medium to test out ideas.
- 'Bosses' must be involved & committed to the project.

REFLECTION & LEARNING

- Set meetings are the main times for reflection; getting feedback; recording & learning.
- Members come to realise the many facets of managerial problems.
- Set's own operation is a vehicle to develop skills in chairmanship; setting objectives; preparing action plans; coaching; counselling; etc.

FUNCTIONS OF THE A-L SET

- Mutual support & encouragement
  - Members ask questions & make suggestions.
  - Seek help from each other.
  - Keep up momentum.
  - Maintain set discipline.
  - Review achievement & plan forward actions.
  - Often 'common ownership' of individual's problems develop.
  - No hierarchical, departmental or superior/subordinate pressures are allowed.
  - Group challenge to individual to perform.
- Bring in a wide range of experience.
- Offer different perspectives to problems.
  - Expose current thinking to outside scrutiny.
- Test out ideas, presentations, etc.

PRE-ACTION-LEARNING BELIEFS & APPREHENSIONS

- I'm not competent to help others.
- They're not competent to help me.
- They're not interested in my problem.
- Mine is a unique problem related specifically to my organisation.
- I'm apprehensive about this 'team approach'.
- I've not chaired meetings before.
- How will I cope without traditional lecture/tutorial support ?

SET ADVISOR'S ROLE

- Establish contact.
- Counsel bosses & participants :-
  - individually, &
  - together
- Get their commitment to act.
- Provide opportunity for action.
- Resource the set.
- Group maintenance & development in early stages.
- Administration; organising meetings & venues in early stages.

ACTION LEARNING SITUATION

TASK	SETTING: UNFAMILIAR	SETTING: FAMILIAR
Unfamiliar	Exchange	Other jobs-own firm
Familiar	Own job in other firm	Own job

Issue 1

EFFECTIVE LEARNING MATERIALS (E.L.M.'s)

* WHAT ARE EFFECTIVE LEARNING MATERIALS ?
* FEATURES OF EFFECTIVE LEARNING MATERIALS

WHAT ARE E.L.M.'s ?

After using the materials, the users will have :-

- changed their attitudes beneficially
- altered their behaviour patterns beneficially
- learned new skills
- acquired more knowledge

In the opinion of the creator of the Learning Materials.

SKILLS

- Motor / manipulation skills.
- Interactive / interpersonal skills.
- Reading / writing / numerical skills.
- etc.

FEATURES

Human presenters may well become an integral part of E.L.M.'s. They must :-

- command & hold the attention of the learner
- build on present levels of knowledge
- promote interaction with the learner
- be effectively organised
- permit feedback concerning progress

ATTENTION The learner needs to attend.

- voluntarily, when motivated by a need to learn & succeed & the material is relevant.
- involuntarily, when the presentation, etc. have been carefully thought through by the presenter eg. adding movement; humour; colour; surprise; novelty; etc.

BUILDING-ON requires the presenter to....

- have knowledge of learner's present levels of knowledge, aptitudes, attitudes or skills.
- start from where they are now,
  - refer to prior knowledge, etc.
  - helps learner put things in context,
  - facilitates assimilation.

FEEDBACK "How am I doing?" "What's in it for me, the learner?" The learner needs knowledge of his/her results. Feedback needs...

- to be rapid to help maintain the learner's interest & momentum.
- to be constructive to encourage progress.
- to indicate errors & what re-learning is needed.

INTERACTION (with humans or machines) should be incorporated into or follow each learning sequence to:

- assist assimilation of new knowledge,
- maintain interest & involvement with the materials,
- build links with new information & present knowledge.

Giving information without interaction or thinking involvement ⇒ entertainment!

Giving information with associated thinking or reflective processes ⇒ learning.

ORGANISED Divide learning sessions into logically sequenced 'chunks' of information & time.....

- to promote interest,
- it is less tiring,
- to allow / space time for feedback,
- gaps between 'chunks' permit reflection, assimilation & gives opportunity for exercises to consolidate learning.

E.L.M.'s may be designed for :-

- Self-directed study,
- Presentation by tutor/trainer,
- Interactive use with computors; machines; programmed texts; etc.

CAREER PATHS OF PROFESSIONAL MANAGERS

* Launching out on the career.
* Career paths.
* Commonly made mistakes.
* Career anchors.
* Professional Identity.

LAUNCHING OUT

Finding a professional identity & managing the spillover.

- EXPLORATION - experiencing situations and discovering your aptitudes & skills. Finding the 'FIT' between personality & work.
- DEVELOPMENT - reinforcing existing skills & finding new ones. Taking risks to increase self-knowledge & develop a sense of values. Negotiating with your family over moves & changes. Intuitive choice of career paths.

CAREER PATHS

Types of career :-

- steady state → discovering your niche & staying there.
- linear → ascending the hierarchy. Professional identity means finding the ladder & not the job. Often lacks self-fulfilment.
- spiral → successive & qualitatively different careers; establishing new 'fits' periodically; oriented towards self-realization & self-fulfilment.
- transitory → lacks a sense of professional identity.

COMPONENTS OF A PROFESSIONAL IDENTITY

- Talents & abilities.
- Motives & needs.
- Attitudes & values.

Attitudinal & emotional components change & evolve slowly through experience.

COMMON MISTAKES

- Pursuing & overvaluing extrinsic, material rewards - can lead to emotional spillover.
- Being governed by what others think might be 'good for your career.'
- Too early choice & lack of exploration leading to 'lack of fit.'
- Becoming a 'misfit.'
- Developing the wrong relationships

MISFITS

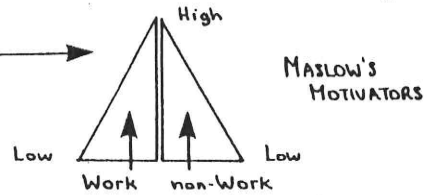
- Competence misfits - lacking the skills & experience for the job.
- Enjoyment misfit - lacks intrinsic enjoyment from work. What was enjoyed is now routine & boring.
- Moral misfit - lacks belief & faith in his work (products).

CAREER ANCHORS

- CREATIVITY - the chance to be creative.
- AUTONOMY - responsibility to act & be entrepreneurial.
- SECURITY / STABILITY } in home, work & life.
- SENSE OF SERVICE
- SENSE OF WORTH in what you are doing.

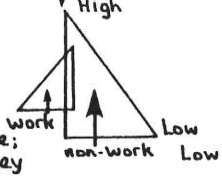
RELATIONSHIPS

- Ideal, Independent R's.
- Conflict Relationships
- Instrumental R's.

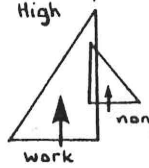


MASLOW'S MOTIVATORS

Balance maintained between working & non-working life.



A bland existence; Work means money for the family.



Work is a drug; excludes non-work; Satisfaction comes from work; Excess physical spillover.

LIFE INVESTMENTS of PROFESSIONAL MANAGERS

* Investments & the 3 careers
* Needs of a professional manager
* Types of stress
* Avoiding stress
* Maintaining the marriage

THE THREE CAREERS In most managers the careers are identifiable & intertwined :-
- Career as husband/spouse.
- Career as parent.
- Career as professional manager.

The manager invests TIME, ENERGY & SELF. (T.,E.,S.)

HUSBAND/SPOUSE CAREER
- T. & E. investment usually lower than necessary with consequent stress on marriage.
- Often high Job Satisfaction means little intent to change the imbalance.

PARENT CAREER
- Often neglected & left to spouse.
- Seen with hindsight as being regretable.
- Low T. & E. investment.
- Usually well-meaning but inadequate.

PROFESSIONAL CAREER
- Initial over investment of T, E. & self at expense of other careers

NEEDS & DRIVES OF A PROFESSIONAL MANAGER
- A reasonable pressure (producing EUSTRESS) to be enjoyed.
- Challenge to be the centre of things or 'where the action is'.
- Work Satisfaction. This is not directly proportional to the extra T. Invested

MARRIAGE is two people committed to live together. Better to live together jointly than in parallel. Key to emotional maturity is expressiveness.

TYPES OF STRESS
- DISTRESS (bad stress) has associated ill effects & emotional spillover.
- EUSTRESS (good stress) stimulates mind & body; invigorates & vitalizes.
- SPILLOVER - when something is taken over the boundary between professional & private life.

Can lead to physical & emotional problems.

Can lead to over-investment of T. & E. seeking further JOB SATISFACTION

LIFE THEMES

The 2 major life themes:
- LOVE
- WORK

- failure in one often leads to failure in the other.
- failure in one is not compensated for by success in the other.
- must have equilibrium between professional & private life.

AVOIDING STRESS
- Select the work environment you prefer.
- Select an activity you like & respect.
- Using leisure.
- Periodic self evaluation & assessment.

USE OF JOINT LEISURE
- as recovery time.
- for venting tensions.
- family-building through joint activities.
- substitute career, looking for non-work fulfilment.

QUESTION

'Am I really cut out for this?'
'Are the rewards worth the cost?'
'Wouldn't I rather be doing something else?'

EXPRESSIVENESS
- Communicating & honestly sharing feelings & thoughts of one's private & professional life

Can lead to emotional development which enhances professional dev't. e.g. through cathartic unwinding after a hard day with spouse as therapist.

SPOUSE'S IDENTITY
- As children grow up, one's self-dev't path requires fulfilment too. (Empty nest syndrome.)
- A sense of personal identity develops.
- Re-negotiates interpersonal equilibrium with spouse through better communication & expressiveness.

SELF-MARKETING

- ✱ The employment scene
- ✱ Personal filing systems
- ✱ Personal inventories
- ✱ Where to look
- ✱ Seeking an interview

THE EMPLOYMENT SCENE

Do not restrict considerations :-

- What functions can you perform?
- What industries do you know?
- What local opportunities exist?
- What salary will you accept?

WHAT FUNCTIONS ?

- What can you do now ?
- What could you learn ?
- What old ones could you revive ?
- What old jobs have new names?

WHAT INDUSTRIES ?

- What product knowledge do you have?
- What customer knowledge do you have?
- What suppliers do you know ?

WHAT LOCAL OPPORTUNITIES ?

- Who could use that knowledge ?
  - Local Government,
  - Charities,
  - Institutions, etc.
- Why limit horizons to home ?
  - U.N.E.S.C.O.
  - W.H.O.
  - I.L.O. etc.

WHAT SALARY ?

- Set realistic minimum.
- What fringe benefits

PERSONAL FILING SYSTEMS

You need a system containing :-

- A personal inventory
- Sample interview Q's & A's
- Sample Q's to ask an interviewer
- Progress sheets on job applic^ns
- Literature, letters, etc.
- Curriculum vitae (C.V.)
- Data base on selected companies

COMPANY DATABASES

- Scan press for info^, comments, articles.
- Reference sources of Co^ info^ from local libraries
  - Kompass
  - Dun & Bradstreet
  - Stock Exch. Year Book
  - Extel cards
  - 'Who Owns Whom', etc.

Request brochures from firms about sales & products, annual accounts, etc.

C.V.

- Typed & well laid out
- Make multiple copies
- Don't re-use creased copies

TRAVELLING INTERVIEW FILE

Containing copies of :-

- relevant correspondance
- application form
- C.V.
- firm's literature
- relevant Q's on job/firm
- personal inventory

PERSONAL INVENTORIES

- Why do you need one ?
- How is it used ?

USED to :-

- sell yourself
- help adapt info^ to fit interviewers requirements

NEEDED as :-

- aide memoire about yourself,
- personal database with
  - dates
  - attainments
  - skills
  - useful experiences → work related / social nature
  - interests
  - aptitudes
  - personal traits / characteristics & U.S.P.'s (Unique Selling Points)

WHERE TO LOOK

- Job centres
- Sunday / daily papers
- Local press
- Technical press & journals
- P.E.R., etc.

SEEKING AN INTERVIEW

NOT seeking a job – first get in and be seen.

- Know how firms fill vacancies
- letter writing techniques.
- presentation techniques
  - letter
  - self
- references & referees
- using C.V.'s
- procedures on attending interviews

Delays, costs & procedures.

Wording, layout, what to include.

Why they are used.
How are they used ?
How to use yours.
Courtesy

USING C.V.'s to reach jobs which are not advertised.

- selection consultants (head hunters)
- employment agencies
- friends & acquaintances
- direct mail

SELF EVALUATION

* WHY BOTHER ?
* HOW TO DO SELF EVALUATION
* TYPES OF 'CAREER ANCHORS'

WHY BOTHER WITH SELF EVALUATION ? Useful when....

- Planning career paths.
- Changing your job.
- Boosting self confidence.
- A form of self appraisal.
- Setting personal objectives.
- Organises your experiences.

PAPERS :-
S.I.M.A. Patterns 3.31; 3.32
Career paths & Life Investments 5.26; 5.27

HOW TO DO IT

- Reflect upon your performance
- Look for 'career anchors'
- List your strengths & weaknesses

- Reviewing what you do.
- Setting targets for change.
- Having criteria for success.

- Factors which help identify areas where a person will perform satisfactorily.

- What talents & abilities do you have?
- What motivates you? What needs have you?
- What attributes do you value in yourself?

TYPES OF CAREER ANCHORS.

- Creativity & entrepreneurism
- Autonomy & independence
- Technical & functional competence
- Managerial competence
- Security & stability

CREATIVITY & ENTREPRENEURISM
- Do you like to develop / create things?
- Do you value autonomy & building your own future?
- Can you manage special projects?
- How do you cope with bureacracies?

AUTONOMY & INDEPENDENCE
- A need to link effort & results?
- An over-riding wish for independence?

TECHNICAL & FUNCTIONAL COMPETENCE
- Derives satisfaction from feelings of competence?
- Seeks career growth here rather than in general mgt.?

MANAGERIAL COMPETENCE
- Stimulated by crises & not afraid of uncertainty?
- Analytical & problem solving skills?
- Communicates well & can lead & influence others to attain organisational objectives?

SECURITY & STABILITY
- Finds security in the 'organisation'; in procedures & orderliness?
- Seeks job security & hates uncertainty?

Disadvantages - blindness to own shortcomings; failure to appreciate value of other attributes. S.I.M.A. motivation patterns are more accurate.

MANAGERIAL STRESS

PAPERS :-
A 346 - Causes & consequences of Industrial Stress

* Types of stress
* Symptom's of stress
* Reducing stress-causing factors
* Frustration
* Measurement

TYPES OF STRESS
- Beneficial
- Non-beneficial

BENEFICIAL STRESS from :-
- Challenging work.
- Interesting work.

NON-BENEFICIAL STRESS
Produced by :-
- Extrinsic factors
- Intrinsic factors

EXTRINSIC FACTORS
- Divorce,
- Death in the family,
- Change in economic circumstances,
- No job security, etc.

INTRINSIC FACTORS
- Temperament,
- Genetic inheritance,
- Age vulnerability at
  - adolescence
  - 35-40 yrs
  - elderly

SYMPTOMS OF STRESS
- Apparent changes in behaviour.
- Physical reactions.
- Mental changes.

TENSION - leading to :-
- Irritability
- Mood changes
- Impatience
- Memory lapses
- Heavier smoking / drinking
- Non completion of jobs.

etc.

Physical reactions manifested by :-
- Loss of sleep, appetite, sexual drive, etc.
- Aches & Pains in head, stomach, etc.
- Acute panic reaction leading to collapse.

Mental changes / illnesses :-
- Common neuroses → depression, breakdowns & anxiety states.
- Serious psychotic illnesses. Existing sufferers from hallucinations, delusions &/or schizophrenia are more vulnerable.
- Psychosomatic diseases

Changes in functions because of psychological imbalance. → high blood pressure, arthritis, coronary diseases.

REDUCING STRESS-CAUSING FACTORS. by :-
- Improving job clarity
- Dispelling doubts
- Increasing job satisfaction
- Having realistic expectations - no over promotion

Increasing J/S through
- job design
- recognition

etc.
some autonomy, yet availability of help, guidance, & supervision.

Improving Job Clarity by :-
- role analysis
- supervision of work standards

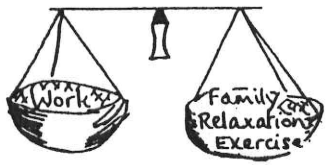
Dispel doubts by :-
- consultation
- communication
- sharing information
- reducing ambiguity
- controlling change

FRUSTRATION
Caused by the inability to achieve goals. resulting in
- Resignation (withdrawal)
- Aggression
- Regression
- Paranoia

- verbal, on persons
- displaced, against things.

MEASURED BY :-
- 'Physical toxicity' (easy)
- 'Emotional toxicity' (more difficult)
- Morale

FINDING THE BALANCE



by →

Not too much emotional involvement
Sharing - problems
- decision making

Counselling.
More delegation.

through →

MANAGERIAL STRATEGIES
- Adopt appropriate managerial style.
- Time management.
- Job design.
- Careful selection procedures.
- Role analysis.
- Communication.
- Delegation

ADVERTISING

* Advertising definition
* What is your organisation's purpose ?
* How should it be integrated ?
* Prerequisites
* What copy to use.

DEFINITION
Any paid form of non-personal presentation or promotion of ideas, goods or services by an identified sponsor

PURPOSE OF ADVERTISING One or more :-
- Inform new/existing customers of new products, changes, etc.
- Develop & maintain loyalty.
- Stimulate enquiries.
- Provide technical information.
- Create a corporate image.

INTEGRATE with :-
- New product development → **NEW PRODUCT DEVELOPMENT**
  Stages :- screening, business analysis, development, testing, commercialisation.
- Sales departments.
- Promotions
- Packaging & Distribution

PREREQUISITES
- Clear objectives & policy.
- Identify advert^{g} budget → **BUDGETING** controls :-
  - which media to use,
  - frequency of exposure
  - sales promotion & merchandising
- Careful market research → **MARKET RESEARCH**
  - Market - area, size, type, etc.
  - Consumers - age, sex, income, family size, etc.
  - Purchasing patterns.
  - Attitudes & dispositions.
  - Product usage patterns.
  - Present competition.
- Know restrictions/controls → **CONTROLS**
  - Voluntary → **VOLUNTARY**
    British Code of Advertising Practice
    Advertising Standards Authority
  - Statutory → **STATUTORY**
    T.V. Act 1954
    Sales of Goods Act
    Indecent Advertising Act
    Trades Descriptions Act, etc.

COPY CHOICE :-
Decided by
- Costs → **COSTS**
  Evaluate costs w. return expected.
- Objectives
- Media used → **MEDIA**
  Know advantages & disadvantages of each.
- Time - available - is it right → **TIME**
  Best time to launch
  - a new product ?
  - a special offer ?
  - Sales ? etc.
- Communication
- How to evaluate ?
  Test market the advertisement.

WHO CAN DO IT ?
- Yourselves ?
- Advertising agency ?

CREATING AN ADVERTISEMENT

* Decide your objectives
* Decisions to be made
* Layout & Design

OBJECTIVES
- For the firm.
- For the advert

FOR THE ADVERTISEMENT
- Change opinions, attitudes, bring about conviction.
- Be informative of current properties or future developments.
- Bring about conviction, enhance reputation.
- Change brand preferences.
- Make the customer act/buy.
- Develop curiosity/enquiries.

DECISIONS required about:-
- The exact nature of the product you are advertising.
- You target population
- What market segment?
- How will you distribute your product?
- What media to use
- Any restrictions/constraints

Industrial, Commercial Market

Vertical .... Small, selective → Small space in 'vertical' media.

Horizontal ... Everybody → domestic market → large space in 'horizontal' media.

outlets → **DISTRIBUTE** via :-
- Direct mail.
- Direct selling
- Through wholesalers.
- Regionally / nationally.
- Retailers

MEDIA to use
- Papers - daily / weekly → Which papers?
  - Popular press.
  - Quality press.
- Magazines - weekly/monthly.
- Specialist journals.
- Radio / T.V.
- Cinemas.
- Posters / placards.
- Exhibitions.
- Direct mail.

Reader reply service?

LAYOUT & DESIGN it should have:-
- Developed focal point & balance.
- Arranged in a logical sequence.
- Created movement.
- Create immediate understanding
- Be original (if possible)
- Attention grabbing

HOW ORIGINAL?
- Attractive.
- Interesting.
- Stylish & readable.

COPY TYPES :-
- Straight line copy.
- Narrative copy.
- Dialogue or monologue copy.
- Picture & caption copy.
- Gimmick copy.

ATTENTION GRABBING

Using :-
- Cartoons.
- Humour.
- Jingles.
- Slogans / words.
- Music or noise.
- Colour or black/white.
- Artwork

REMEMBER
Short paragraphs
Short sentences
Short words

Declarative.
Questioning.
Testimonial.
Command.
Promises.
Curiosity.

CONSTRAINTS
- Time
- Money → cost/benefit considerations
- Competition

BEWARE - losing the message!

ADVERTISING BY DIRECT MAIL

* Why use direct mail ?
* Advantages of direct mail
* Planning your D-M campaign

WHY USE DIRECT MAIL ?
- Reaches selected target group.
- Reduces wastage from blanket coverage.
- Proven higher response rate.
- An advertising medium less easily ignored.
- Fewer restrictions on format.
- Fewer time restrictions.
- Quick & easy response.
- Measurable response rate.

DEFINITION :- A method of sending unsolicited advertising or promotional material through the post to customers or potential customers at specific named addresses.

UNRESTRICTED FORMAT.
Few restrictions on colour, size, shape, time of the advertisement.

TIME RESTRICTIONS
Compared with TV, Radio, or newsprint .....
Advance bookings less necessary.
Easily keyed into special events.

QUICK RESPONSE
via FREEPOST, prepaid envelope or business reply cards.

ADVANTAGES
- Exclusive – needs no recourse to other advertising.
- Stands alone or integrates with other activities.
- May have other end-objectives.

END OBJECTIVES ... eg.
'Door-opener' prior to a visit.
'Familiariser' " " " "
Test consumer reaction to new products or services.
Making overseas contacts at minimum expense & personal inconvenience.

PLANNING A CAMPAIGN
- What are you selling?
- How will you advertise it ?

SELLING SKILLS
Know the product
Analyse the market
Cost it out.

What is your budget ?
What will be the unit cost ?
Any follow up mailing?

Know its unique selling points.
What is the competition ?
Is it good value ?

What is the market ?
How big is it ?
What is your customer profile ?
What product factors would influence your customers?

ADVERTISEMENT FEATURES
Points to consider :-
- the wording.
- reproducing the letter.
- using the envelope.
- producing a mailing list.
- handling
- evaluation techniques.
- using post office facilities.

WORDING
Drafting & style
Short & to the point.
Stressing 'you' & not 'we'
Facts which interest & excite curiosity
Make responding easy

P-O FACILITIES
- Reply-paid services
- Franking services
- Collection services
- Boxes
- Discounts

EVALUATION / RESPONSE MONITORING
- Precise measurement is possible.
Knowing :-
No. of replies,
No. of orders,
No. of unopened returns,
Degree of interest.

HANDLING
Selves, or
Professional Mailing Houses
Mechanical enveloping
Computerised mailing lists & label printing

USING THE ENVELOPE
Consider the surface for carrying further information or advertising

REPRODUCING THE LETTER
Autotype - using programmed typing machine.
Facsimilie handwriting
Type & litho reproduction

FRANCHISING

*What is a FRANCHISE ?
*Basic Features of a franchise.
*Why should franchising succeed ?
*Disadvantages for a franchisee.

WHAT IS A FRANCHISE ?

A contractual relationship between Franchisor & franchisee whereby :-
- the franchisee operates under the common name / process, etc. of the franchisor.
- the franchisor is obligated to maintain a continuing interest in the business of the franchisee.
- the franchisor is paid for initial (and the continuing) services provided.

Examples
- Petrol filling stations.
- Fast foods & drinks.
- Hotels / motels.
- Syndicated cartoon strips
- Motor accessories & rentals.
- Weight watching clubs.
- Personnel / employment agencies. etc

BASIC FEATURES
- Ownership by one person of a patented idea / trade-mark / process / item of equipment / etc. & associated goodwill. This is then.....
- Licensed to another for exploitation.
- The licensee / franchisee owns his business.
- Regulations relate to this business operated by the licensee / franchisee.
- Payment is made for the rights (above).
- Franchisors obligations

→ Franchisee must make a substantial capital investment from his own resources.

→ guidance in selection of site, shop-fittings, budgeting etc.
→ business / process training for licensee / franchisee (to include marketing).

DISADVANTAGES - for Franchisee
- Franchisor controls & regulates.
- Continuing royalties or fees.
- May become dependant upon franchisor.
- Selling the business.
- Possible waning of brand popularity.
- Suffer for franchisor's business mistakes.
- Franchisor as 'overseer' & possible friction.

WHY SHOULD IT SUCCEED ? for Franchisee...:
- Reduced risk due to....
  - existing product goodwill & brand image.
  - basic training for staff & owner.
  - benefit of accumulated business experience.
  - interest & guidance of franchisor.
  - franchisor's 'troubleshooting' services.
- Franchisee's motivation is increased if he owns the business he is running.
- Possibly lower setting-up costs.
- Territorial guarantees by franchisor.
- Benefits from franchisors activities eg

→ book-keeping, staff selection, business procedures, stock / inventory control, production / quality control, etc.

→ stock selection, equipment purchase, marketing, promotion, innovation, quality control. (other franchisees)

→ national advertising, R. & D., market information, etc.

FRANCHISOR HAS - a product, skills, experience, business know-how.

FRANCHISEE MAY HAVE - no skills, no experience, some capital.

SETTING UP A FRANCHISE

* Stages
* How does the FRANCHISOR benefit?
* Disadvantages for the franchisor
* Remuneration for the franchisor
* Contractual considerations

STAGES
- Concept
- Pilot scheme
- Development & marketing
- Establishing accounting & business procedures

Ultimately it must be well-tried & tested & demonstrably viable to attract franchisees.

Test market in different locations & develop novelty &/or distinguishing 'gimmicks' – using your own money.

Establish criteria for....
- locations.
- growth potential.
- environment (other shops).
- population distributions.
- traffic flows (foot & vehicular).

Distinctive shop-fittings, decor, packaging, etc.

Promotional (point-of-sale) activities, literature, etc.

Information dissemination.
Training skills.
Head office organisation.
Trouble-shooting experience.
Product control, innovation, etc.

FRANCHISOR BENEFITS
- Does not own the business he supports.
- No staff worries or mgt. problems.
- Wider distribution of outlets.
- Continuing royalties / returns.
- No cash flow problems.
- Rapid growth without capital investment.

He can undertake large contracts / bulk purchases then subcontract or retail to the franchisees.

FRANCHISOR'S DISADV.'S
- Lower returns than if owned business.
- Is he training a potential competitor?
- Is licensee making correct returns?
- Franchisee may become too dependant.
- Franchisee feels independant & needs careful handling.

CONTRACTUAL CONSIDERATIONS

Nothing should be accepted as 'implied' but should be carefully stated covering before & after business opens. e.g.
- Lay out franchisor's obligations & the nature of the 'package'.
- Lay out franchisee's obligations & manner of payment.
- It links franchisor & franchisee with consumers & other franchisees.
- Lay out future provisions eg. modernisation & investment req'ts.
- Conditions & circumstances for termination of the contract.

FORMS OF REMUNERATION One/more
- Initial fee.
- Sale of initial franchise 'package'
- Sale/lease of equipment (possibly specialised.)
- Franchisor might sublet premises.
- Commissions for acting as agents.
- Royalties.

Could comprise: consultancy, equipment, training, supplies.

Maybe obligation to purchase consumables from franchisor.

from wholesalers
from property, finance firms for acting as agent.

REFERENCE AUTHORITIES :-
B.F.A. British Franchise Association
I.F.A. International Franchise Assoc.

SPONSORSHIP

* What is SPONSORSHIP ?
* What things are SPONSORED ?
* Who benefits from sponsorship ?
* Objectives of sponsorship
* Looking for a sponsor

A DEFINITION :-

"A mutually beneficial business arrangement between sponsor and sponsored to achieve definite objectives."

Also described as :-

- a marketing tool,
- a form of advertising,
- a form of patronage, and in some countries.....
- a tax-deductible ploy !

Sponsor contributes cash or kind & in return gets publicity.

WHAT IS SPONSORED ?

- Cultural activities
- Sporting activities

Orchestras - e.g. London Symphony Orchestra.
Music - composition & performances.
Art - 'Tate' gallery, Italian renaissance families.
Literature - 'Guinness' (Records), 'Wisden's' (Cricket).
Community arts

Racing, Tennis, Golf, Athletics, Darts, Snooker, etc.

WHO BENEFITS ?

- In sport : players' costs reduced, prize money raised, spectator facilities enhanced.
- Sponsor's business image, enhanced.
- Community, socially valuable pursuits continued.

Rewards are not always tangible. Valuable P.R. from being seen to be good corporate citizens.

OBJECTIVES

- Widespread publicity & media exposure - (especially T.V.)
- Increased public awareness of company's products.
- Improved public image.
- Adds flair & appeal to the marketing mix.

not an alternative to advertising. Needs careful & tasteful marketing.

LOOKING FOR A SPONSOR ?

- What is the lure of the activity ? → for the participant & for the spectator
- Examine the activity → its image, philosophy & scope for expansion. → study & predict changes in leisure-time activities
- Match the consumer's interests/ profile with sponsor's products. → 'up-market' products for 'up-market' activities
- Do you need a long-term association ?
- Research the potential sponsor → examine the company's products, style, marketing philosophy, corporate profile, etc.
- Research related merchandising. → for souvenirs, equipment, kit, etc.
- Handle the approach professionally with specialist consultancy advice.
- Identify the right person in the organisation to approach.

BEWARE :- sponsoring firm should not overshadow what is associated with it. Also that 'sports are sponsored for the benefit of the sponsor.'

REASONS FOR FAILURES

- Mismatch of scheme & sponsor.
- Good ideas mishandled.
- Incompatible with marketing philosophy.
- Not a wholehearted commitment.
- Market forces beyond one's control.
- Co-sponsorship creating difficulties due to differing objectives of the co-sponsors.

Advisory body :- British Association for Business Sponsorship (BABS)

SURVEYS

* Types of Survey
* Procedures
* Other considerations

TYPES OF SURVEY
- Factual information
- Feelings & opinions

FACTUAL INFORMATION e.g.
- National 10-yr. census.
- Reading/buying habits.

ATTITUDE SURVEYS e.g.
- Opinion polls. → Voting, Immigration, etc.

PROCEDURES
- Planning.
- Method/strategies.
- Techniques.
- Analysis.
- Implications.

OTHER CONSIDERATIONS....
might include...
- Regional &/or National?
- Nature of the report.
- Cost effectiveness of the exercise.
- etc.

PLANNING
- Define objectives, boundaries, target. population.
- Decide what information is needed.
- Review existing information if any available.
- Examine your resources → time, money, staff.
- Reduce variables.

METHOD
- Pilot survey
  - design questionnaire → structure & wording of questions
  - decide sample population.
  - choose technique.
  - choose data processing method → determine reliability & validity of survey instrument.
  - select scales → for attitudes:- Likert, Guttman, Thurstone
  - feedback mechanism
- Main survey
  - amend questionnaire/interview schedule
  - brief interviewers
  - plan use of survey instrument & how to collect returns.

TECHNIQUES
- By desk research?
- By field research? using
  - mail,
  - telephone,
  - observation,
  - group discussion,
  - projection techniques,
  - personal interviews

could be.....
Structured interviews,
semi-structured interviews, or
un-structured interviews.

IMPLICATIONS
- Consultant's report.
- Respondent's interpretation.
- Likely effect of findings.

ANALYSIS
Will it be :-
- a descriptive report
- an analytical report

How accurate are the findings?

SYSTEMS ANALYSIS

* OBJECTIVES OF SYSTEMS ANALYSIS
* WHO DOES THE SYSTEMS ANALYSIS ?
* GATHERING THE INFORMATION
* STAGES IN SYSTEMS ANALYSIS

OBJECTIVES OF S.A. To answer the following questions. Are things being done :-

- The right way ?
- In the right place ?
- In the right amounts ?
- In the right order ?
- At the right costs ?
- To the right quality ?
- By the right people ?

→ What else should / needs to be done ?
- What / where is the role of New / Information Tech'y ?
- How / should we integrate the new system ?

3 OPTIONS
- Develop a totally new system with its own internal org'n, inputs & outputs.
- Produce an enhanced version of the existing system by the application of New Technology.
- Review the organisation's prime objectives to determine if N.T. will better extend the present system.

WHO DOES THE S.A. ?

By a systems analyst who needs to know & understand :-

- The organisation of the present system
- The methods in operation
- The quality & quantity of the work being done.
- The costs involved.
- The benefits of these services

- As perceived by others.
- See all flowcharts.
- See organisation charts for the organisation.

PROJECT LEADER / MANAGER
- Primarily a competent manager & secondly a systems technician.
- Who will accept viable disagreements in decision-making.
- Who will lead rather than push people into accepting new systems.
- Who can interpret information & act as intermediary between management & computer staff.
- An exponent of 'satisficing'.

'SATISFICING' - settling for 'fair' or 'better' instead of 'best' so enabling attention to be given to the next highest order need.

STAGES IN S.A.
- Identify the problem(s)
- Set objectives.
- Collect information.
- Design phase :
  - generate & evaluate alternative solutions,
  - approve a solution,
  - pilot & evaluate a solution.
- New design becomes the existing system.

GATHERING INFORMATION by :-
- Simple & efficient interviewing.
- Collecting all forms currently in use.
- Identifying their paths through the organisation.
- Outlining their destination & purpose.
- Identifying performance measures.
- Identifying costs & user benefits of the present system.

WHAT IS 'SYSTEMS ANALYSIS' ?
- A methodological tool with multi-uses. (It is not equally effective in all situations.)
- It provides understanding but NOT solutions. Successful solutions are based on the correct understanding of problems.
- Implies a desire to incorporate New Technology if feasible.

∝ ISSUE 1

ENERGY, UTILITY & RESOURCE MANAGEMENT

* Energy & utility definitions
* What happens when work is done?
* Environmental support
* Linking in the human factor
* Continuing the analogy

DEFINITIONS
- **ENERGY** – the capacity to do work.
- **UTILITIES** – specific sources of energy.

SOURCES e.g.
- Electricity,
- Heat,
- Fuel,
- Money, etc.

WORK
- Energy is converted from one form to another to produce an 'end-product'.

ENVIRONMENTAL SUPPORT requires :-
- Provision of space for work to be undertaken safely.
- Removal of waste/by-products.
- Support facilities
- Information support systems.

SUPPORT FACILITIES
- Storage,
- Toilets,
- General office,
- Kitchen, etc.

HUMAN FACTOR :- making the analogy in humans.
- Energy Source – time, knowledge, skill, expertise, desire to work, etc.
- Work Done – thinking, planning, scheduling, controlling, doing, etc.
- End Product – efficient running of an organisation.

EFFICIENT MANUFACTURE	EFFICIENT MANAGEMENT
Reduction of waste; recycling waste; selling waste.	Reduction of waste through economical use of time; maximise on individual's skills, qualities, knowledge, etc.
Servicing & maintenance function to reduce breakdowns, off-time, etc.	Attention to hygiene factors, conditions of service, motiv^{n}, job enrichment, job satisfaction training, etc.
Accurate cost data & comm^{n}. system between accounts, stores, sales, etc. to maintain efficiency.	Accurate comm^{n}. & info^{n}. links between individuals maintains morale & efficiency.
Generate money (profit) to finance the cycle of manufacture.	Generate the will to work through motivation, job satisfaction, etc.
Continual/continuing supply of energy ensures that production continues.	

ACTION PLAN Production depends upon the energy supply so the maintenance costs are worthwhile.
- List all your attributes/utilities & describe how they are used.
- Periodically study (monitor) their consumption & replenishment.
- Check the conversion process to eliminate waste.
- Conserve energy and maintain the efficiency of the utilities.
- Periodically check for undesirable trends (stress) & investigate variances.
- Periodically examine procedures for maintaining utilities.

i.e. self development.

CONSIDER THE MAINTENANCE EXPENSES OF YOUR CAR, PER ANNUM. DO YOU. SPEND THE SAME ON YOUR OWN TRAINING, UPDATING & KNOWLEDGE ACQUISITION ie.' PROFESSIONAL MAINTENANCE' ?

PURCHASING & STOREKEEPING

* Types of PURCHASING
* Objectives of Purchasing
* Functions of purchasing dept.
* Storekeeping
* Storekeepers relationships
* The buying process

TYPES OF PURCHASING
- for resale → Buyers purchase what their customers will buy without further processing. (wholesaling & retailing)
- for consumption → Converted into finished products for sale. (manufacturing industry)

OBJECTIVES OF PURCHASING
- Support production. → Uninterrupted flow of materials.
- Cost effectiveness. → Competitive buying from reliable suppliers.
- Develop relationships. → With suppliers & within the organisation.
- Training staff. → In policy & procedures of purchasing.

FUNCTIONS OF PURCHASING DEPT.
- Buying → Interviewing & selecting suppliers.
- Progressing orders → Ensuring delivery on time.
- Purchasing research → Vendor analysis.
- Inventory control.
- Auditing invoices. → Checking for discrepancies.
- Storing materials.
- Standardisation → Compatible with production control.
- Receiving materials.
- Movement of materials → In-plant.
- Value analysis → Are purchases best value for money?

THE BUYING PROCESS
- Requisition.
- Securing quotation.
- Selecting suppliers.
- Placing orders
- Expediting delivery.

LEGAL & FINANCIAL CONSIDERATIONS
- Preconditions ... understand the laws of contract.
- The CONTRACT implies a promise to supply & a promise to pay.... need not be written but confirmation is desireable.

STOREKEEPING
- Objectives → Maintain smooth production flow.
- What to store → STORAGE - raw materials, - materials in process, - finished products, - supplies (not production oriented), - equipment.
- Location & layout → LOCATION & LAYOUT. Factors include :- - preferential locations to reduce transportation & facilitate handling. - ease of inventory checks. - racking & storage considerations.
- Storekeepers functions → FUNCTIONS may include :- - controlling stock movements from reception to issuing. - inventory control. - planning work activities. - utilization of space.

RELATIONSHIPS on a 'need-to-know' basis with :-
- Production dept. → PRODUCTION ... medium- & long-term plans.... permits hedging against price fluctuations; change of suppliers; special bulk purchases; etc.
- Marketing dept. → MARKETING ... to know production plans allows longer lead times.
- Engineering dept. → ENGINEERING .... knowledge of supplier's capabilities to provide components, affects 'make-or-buy' decisions.
- Finance dept. → FINANCE ... funds for spot purchases without requisitions.

FILM :- 'Never take YES for an answer'
A 40 - Purchasing
A 136 - Rating & Using Supplier Resources
A 137 - Purchasing Procedures
A 161 - Legal aspects of Purchasing

RANK

Issue 2

STORES MANAGEMENT

* WHAT IS STORES MANAGEMENT ?
* WHAT AREAS ARE COVERED ?

STORES MANAGEMENT
- Means using :
  - Management techniques,
  - O. & M. techniques,
  - Engineering techniques,

to acquire, keep & issue the goods & materials therehold in the most effective way.

MANAGEMENT TECHNIQUES e.g.
- Problem analysis & solution.
- Planning & control.
- Training & staff development.
- Purchasing & negotiation.
- Motivation & discipline.

O. & M. TECHNIQUES
- Methods improvement.
- Inventory control.
- Office & stores layout.
- Form design.
- Systems design.

ENGINEERING TECHNIQUES
- Design of materials handling.
- Design of storage.
- Maintenance of equipment.

SCOPE OF STORES MANAGEMENT
- Purchasing & Expediting
- Delivery & goods receipt
- Warehousing & storage
- Record keeping & inventory control
- Movement & handling
- Packaging & Shipping
- Payment - on arrival
  - before despatch
- Staff management

PURCHASING & EXPEDITING
Purchasing means :-
- Assessing the supplier, their reliability; quality & production control & financial viability.
- Drawing up specifications for suppliers.
- Considering cash flow when ordering.
- Negotiating the best deal on price, quality, delivery & reliability.

Expediting means getting goods delivered :-
- on time (or enforcing penalty clauses),
- in full quantity,
- to the specified quality.

RECORD KEEPING / INVENTORY CONTROL
- Stock control policy, L.I.F.O. or F.I.F.O. ?
- Reorder levels / quantities / frequency ?
- Stock allocation.
- Forecasting requirements....
  - historically (moving average) ?
  - estimates ?
  - on requirements ?
- Record keeping & system specification (store classification ?)

DELIVERY & GOODS RECEIPT
- Getting the goods to store. Who is responsible for.....
  - transport ?
  - damage ?
  - delay ?
- Who should.....
  - insure them ?
  - know where they are ?
  - check them on arrival ?
  - put them into store ?

STAFF MANAGEMENT means :
- Working with your staff to meet
  - your objectives,
  - organisation's objectives.
- Developing & motivating them.
- Handling problems & discipline

PAYMENT means :
- Who clears the goods on arrival ?
- Who do they inform & how ?
- Who clears goods for despatch ?
  - for satisfactory quality,
  - checks on customer credit.

MOVEMENT & HANDLING means:
Racks & shelving; bins, pallets & boxes; labels; sack trucks & floor handling; cranes & overhead handling; air tubes & automatic handling & the maintenance of such equipment.

PACKING & SHIPPING means :
- Protecting the goods using...
  - packing cases,
  - boxes & packets,
  - dividers & packing.
- Arranging shipment
  - by whom ? when ?
  - insurance cover,
  - who pays & checks delivery ?

WAREHOUSING & STORAGE means :
- Storing the goods or materials....
  - at the right temperature,
  - at the right humidity,
  - secure from theft,
  - where they may be found,
  - where they may be moved easily & conveniently,
  - safe from damage from men, machinery, animals, atmosphere,
- Using space as effectively as possible.
- Using machinery safely, efficiently & maintaining it.
- Using manpower safely & effectively.
- Stock taking.

WHAT IS YOUR JOB ?
Responsibilities vary in different organisations.
- Outline your job & those of your staff.
- Agree objectives in each area.
- How can you improve performance in each area ?
- Agree action plans.

◄ Issue 2

See papers :- A.739 C.482/483/484/485

MATERIALS MANAGEMENT

- ✳ WHAT IS MATERIALS MANAGEMENT ?
- ✳ WHAT MATERIALS ARE CONCERNED ?
- ✳ THE STAGES OF MATERIALS MANAGEMENT
- ✳ SUPERVISOR'S ROLE

MATERIALS MANAGEMENT
- Uses, management & engineering techniques to get the most useful goods from the least material and to acquire & keep the goods & materials in the most effective way
- Attempts, to avoid delays & wastage of materials

TECHNIQUES
- Planning.
- Analysis.
- Training.
- Methods improvement.
- Inventory control.
- Purchasing.
- Design of machines & products.

REDUCES WASTAGE
- Time wastage in materials handling & delays when materials are unavailable.
- Material wastage by wrong processing or damage in handling or storage.

For 'STAGES' see Outline 5.41 'Stores Mgt.'

SUPERVISOR'S ROLE
- Record ..... material receipts, location & usage.
- Improve methods by reviewing current usage.
- Reduce wastage by informing, training & controlling subordinates.
- Look after materials avoiding spoilage, damage, theft, etc.

WHAT MATERIALS ?
- Materials for production
- Consumable supplies

MATERIALS FOR PRODUCTION
- Raw Materials: materials with little or no previous processing eg. ore; sand; gravel; steel sheet or bar; farm produce; etc.
- Semi finished Materials bought semi-finished or work-in-progress; component parts or goods needing further processing.
- Completed Parts bought out finished; made-in parts or ready-for-assembly; etc.
- Finished goods ready for packaging or despatch.
- Packaging Materials cartons; boxes; bottles; cushioning & dividers; wrappings; binding materials; labels; etc.
- Finishing Materials paints & dyes; plating & anodising; glazes & waxes; etc.

CONSUMABLE SUPPLIES
- Those which don't become a part of the finished goods but which have to be used to make the goods or supply a service.
- Other

- **MANUFACTURING SUPPLIES**
  Cutting oils; tumbling & polishing materials; sanding materials; grinding & cutting wheels; etc.
- **HAND TOOLS**
  Knives; saws; spanners; drills; scribes; chisels; screwdrivers; etc.
- **MAINTENANCE SUPPLIES**
  Lubricants; paints; bricks; cement; nuts & bolts; etc.
- **HOUSEKEEPING SUPPLIES**
  Disinfectants; soaps; polishes; brushes; etc.

- **OFFICE SUPPLIES**
  Computer stationery; paper; books; forms; reprographic mat'ls; etc.
- **SPARE PARTS**
  Plugs; leads; fuses; belts; bulbs; gears; gaskets; etc.

MAINTENANCE MANAGEMENT

* THE OBJECTIVES OF MAINTENANCE
* REDUCING MAINTENANCE COSTS
* PLANNING & CONTROLLING MAINTENANCE

THE OBJECTIVES OF MAINTENANCE

- To minimise lost production time
- To maintain production quality
- To minimise maintenance costs

LOST PRODUCTION Due to failure of plant; eqpt.; or services by..... preventing breakdowns; late starts; construction or installation delays.

PRODUCTION QUALITY ALTERNATIVES

- Check at intervals & service later.
- Service at fixed intervals.
- Replace parts/plant at set intervals.
- Overhaul at set intervals.

COSTS OF MAINTENANCE

- Loss of profit on production lost.
- Costs due to machine changes & subsequent overtime work.
- Cost of standby equipment.
- Cost of spares inventory.
- Cost of maintenance staff & overheads.
- Cost of materials & spare parts.

MAINTENANCE, PLANNING & CONTROL

- Monitor maintenance costs....
- To help decide upon :-
  - plant replacement
  - frequency of preventive maintenance, &
  - action on preventive maintenance.
- Allocate resources..... (men; equipment; money)

RESULT ..... assists production control.

REDUCING MAINTENANCE COSTS

Costs are reduced by :-

- Improving staff usage
- Anticipating failures & breakdowns
- Improving servicing
- Improving spares service
- Replacing plant.

IMPROVING SPARES SERVICE

- Plan stock holdings.
- Record stocks held.
- Discipline stock issues.

IMPROVING SERVICING

- Link with eqpt. inventory.
- Improve record keeping.
- Establish a servicing policy.

(Contract out?)

IMPROVING STAFF USAGE

- Control work
- Work location

CONCENTRATED LOC^{N}

Advantages of specialisms; better eqpt. & utilisation.

DISTRIBUTED ORGAN^{N}

Advantages of being nearer to job; more local knowledge; maint^{ce} & prod^{n} interchangeable; closer prod^{n} liaison; job enrichment due to local status.

PLANT REPLACEMENT

Consider :

- Breakdown frequency & causes,
- Breakdown maintenance costs,
- Costs of lost production due to breakdowns,
- Spares availability,
- Effect on output & quality.

CENTRALISED CONTROL gives;-

- better utilisation through
- better control information.
- better spares service.
- controlled maint^{ce} schedules.

DE-CENTRALISED CONTROL gives:-

- better morale in smaller units.
- closer production liaison.
- greater flexibility.

PAPERS :-
A.123 - Maintenance mgt.
also A.370 → 375

STOCK CONTROL

- ✳ WHY HAVE STOCKS ?
- ✳ OBJECTIVES OF STOCK MANAGEMENT
- ✳ CONTROLLING INDIVIDUAL STOCK ITEMS
- ✳ RECORDING STOCK TRANSACTIONS

WHY HAVE STOCKS ?

- To offer quick delivery
- To order in sensible quantities
- To get better utilisation of machines & staff

QUICK DELIVERY

- Can you get it 'off the shelf'
- Do you need it at once ?

STOCK IS NEEDED if :-

- it takes too long to get it from elsewhere, or
- procurement time is greater than quoted delivery time.

ORDER IN SENSIBLE QUANTITIES

- avoids high procurement costs on lots of small orders.
- receive quantity discounts.
- avoids frequent job changes on machines as stocks run out.

OBJECTIVES

- Stocks not too high
- Stocks not too low

COSTS OF LOW STOCKS

- Delays leading to poor customer service.
- Poor quantity discounts.
- High set-up manufacturing costs
- Poor utilisation of men & machines.

COSTS OF HIGH STOCKS

- Money tied up in stocks.
- More storage space needed.
- More stores staff needed.
- Higher obsolescence costs.
- More wastage due to theft; damage deterioration; etc.

CONTROLLING INDIVIDUAL ITEMS Either :-

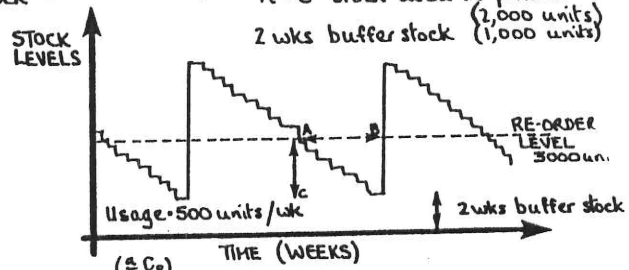
- Order a fixed amount on a variable cycle, (Advantage if high usage or high obsolescence cost) OR
- Order a variable amount on a fixed cycle, (Advantage if low clerical costs req'd; low usage value or fixed manufacture/delivery/processing cycle).

ORDERING ON VARIABLE CYCLE

- Fixed amount, when to order ?
  Re-order level = Usage in procurement time + buffer stock
- Buffer stock calculation considers :-
  - service level required.
  - supplier service.
  - procurement time.
  - usage variation.
  - order frequency
- Estimating usage, from
  - customer orders,
  - past demand,
  - prod'n/sales programme.
- How much to order ?
  - economic batch quantity
  - -ditto- with same number of orders per year
  - tables will give the batch quantity for each period usage value.

EXAMPLE

A→B procurement time (4 wks)
A→C stock used in pr.time (2,000 units)
2 wks buffer stock (1,000 units)



$q = \sqrt{\frac{2aC_o}{C_u I}}$

$q_v = K\sqrt{av}$ = batch quantity value.

I = Cost of holding stock ; C_o = Cost of ordering ; C_u = Unit cost ; K = constant ; av = annual usage value

STOCK RECORDS

- Control on past demand. Easier; uses physical stock check (2 bin or label) & stock cards with stock &/or total cover
- Control on customer orders, (Tighter) or Sales predictions Shows free cover

DATE	REF. No	RECEIPT	ISSUE	STOCK	ORDER	ORDERS O/S	TOTAL COVER	REQ'T	REQ'TS O/S	FREE COVER
		A	B	C	D	E	F	G	H	I
				(A-B)		(D-A)	(C+E)		(G-B)	(F-H)

(Well suited to computerised mgt.)

PAPERS :-
A.178 Inventory mgt.
A.403 Exponential smoothing
Exercises C.102+105
C.146

USING EQUIPMENT & FACILITIES

* THE EQUIPMENT INENTORY
* USING EQUIPMENT EFFECTIVELY

THE EQUIPMENT INENTORY

Consider :-
- The FORM of the inventory
- The PURPOSE of the inventory
- The SOURCES of inventory DATA

DEFINITION

The EQUIPMENT INENTORY is a systematic process of keeping an up-to-date record of what production & operating equipment is used.

THE FORM of the inventory gives :

- its complete specifications,
- operating procedures,
- its history of use & maintenance.

DATA SOURCES

- Equipment nameplate.
- Equipment itself.
- Operating manuals.
- Plant engineer's dept.
- Production records.
- Machine operators.

The PURPOSE of the inventory :

- to plan & schedule .....
  - costs,
  - output,
  - downtime,
  - maintenance.
- to avoid machine overload & misuse.
- to improve operator safety.
- to improve maintenance.
- to justify & plan replacements.

EFFECTIVE USAGE

- Provide adequate space
- Provide adequate commun^{ns}
- Consider equipment layout
- Assign work effectively

PROVIDING ADEQUATE SPACE

Consider :
- output per sq.ft.(m^2),
- sq.ft.(m^2) per employee,
- overall storage area,
- overall production area.

Minimise non-productive areas :
- aisles,
- stores (goods inwards / work in progress / finished goods)

ASSIGNING WORK

- Machine utilisation
- Scheduling work

SCHEDULING WORK

- Keeping each machine / facility producing / operating as much as possible.
- Finishing each job as soon as possible.

Use GANTT (bar) charts;
Machine load charts;
Production budget reports;
Machine run times.

EQUIPMENT LAYOUT

Consider :
- enough space for employee,
- room for material handling,
- distances to be moved (any purpose),
- possibility of oral communication,
- groupings for supervision & quality checks.

PROVIDING GOOD COMMUNICATIONS

Consider physical connections with :
- management offices,
- personnel,
- accounts,
- sales, design, etc.
- safety services,
- maintenance services,
- stores & materials,
- utilities (toilets, canteens, etc.).

MACHINE / FACILITY UTILISATION

- Respect speed / load / capacity limits.
- Respond to quality capabilities.
- Assure timely maintenance.
- Use equipment safely.
- Schedule maximum production hours.

COMPANY STRUCTURES

* CENTRALISED
* DECENTRALISED

FEATURES OF CENTRALISED ORGANISATIONS

- Economies of SIZE → better able to deal with dominant factors in the organisation's environment, eg. competition; govt legislation, economic variations.
- Economies of SCALE → human resources – recruitment, training, etc. buying; transport; delivery; handling; storage; etc.
- All decision making at higher levels.
- Establishes a hierarchy → – reduces flexibility to react.
  – offers promotional prospects.
  – discourages initiative taking.
  – reduced delegation & responsibility
  – encourages specialisation
  – better staff · personnel, · training, · accounting, etc
- Needs strong authority at top
- Easier to impose uniformity → – treatment of employees through company rules etc.
  – shops; displays; services.
  – marketing & advertising.
  – computerised accounting; stock control; ordering; etc.
- Disadvantages → DISADVANTAGES

DECENTRALISED

- Implies DIVISION → into Regions, Areas, Sections, Departments, etc. → also division of responsibility & authority.
- Requires INTEGRATION → must follow to maintain effective organisation & form relationships between the different groups

FEATURES OF DECENTRALISED ORGANISATIONS

- Decision making now at lower levels.
- Fixes accountability.
- Increased flexibility to respond to market forces, competition, etc. → faster too.
- Communication problems reduced.
- Fosters initiative-taking. → requires capable managers.
- Top management must be strong to be able to take risks.
- Increased administrative costs due to duplication of facilities & systems.
- Fosters independence →
  – could be beneficial (motivating).
  – could be detrimental to parent organisation if taken to extremes.

DISADVANTAGES

- Overloading key employees.
- Extended lines of communication → · workers distant from decision making; skills underused; lack of recognition; loss of identity; communication breakdowns ⇒ resentment.
- Slower response to changing environmental factors. → · internal problems · labour problems · changing customer preferences.
- Too many, too diverse products.

Safety & Health

* What responsibility do you have for safety & health ?
* How do you manage safety & health ?
* Action after an accident.

RESPONSIBILITIES (Definitions)

- **Safety** is the prevention of accidents in order to avoid :-
  - * injuries to people,
  - * damage to equipment,
  - * damage to premises, &
  - * damage to the environment.
- **Health** - the prevention of work related disease, illness & serious discomfort which could harm the ..... :
  - * physical or mental wellbeing of employees,
  - * physical or mental wellbeing of the public

AFTER AN ACCIDENT

Procedures vary if
- damage but no injury,
- neither damage nor injury,
- damage & injury

First aid ....
- from where,
- by whom.

Accident investigation
- why investigate ?
- who investigates ?
- how do you investigate ?
- when do you investigate ?

How to investigate

You need to ask questions about
- the injury,
- the accident,
- the unsafe acts & conditions,
- the people involved,
- were regulations / procedures adequate ?
- contributory factors.

MANAGING SAFETY & HEALTH

- Accident prevention
- Responsibility for safety
- Managing safety
- Safety representatives

PREVENT ACCIDENTS
- for humanitarian reasons.
- for economic reasons.
- for legal reasons

RESPONSIBILITIES
- rest on management,
- on safety officers & reps.
- on employees

SAFETY REPS
- elucidate benefits, status & powers
- what authority ?
- knowledge of .....
  - * legal requirements,
  - * physical hazards,
  - * working practices.

too hot / cold
chemical / biological hazards
stress
noise / vibrations
fumes / pressure variations
invisible rays / radiations

MANAGING SAFETY
- organise for safety → officers, representatives, committees, regulations & legislation, training & procedures, union involvement.
- plan for safety → buildings, purchases, equipment, contractors, work area, remove hazards, etc

PUBLIC RELATIONS 2. (How does the customer see us?)

* What is Public Relations?
* What does the customer want?
* Whose responsibility is it?
* How do you improve P.R.?
* Where do we affect P.R.?

What is P.R.?
- The deliberate, planned effort to establish & maintain a good understanding between an organisation & its public.

The customer wants
- An efficient service which
  - does/provides what they want,
  - as quickly as possible, &
  - to the quality they want.
- Convenience.
  - minimum effort to get what they want.
  - they decide what is minimum effort.
- Economy.
  - paying the minimum cost for the service/goods they want.
- Protection.
  - from financial loss,
  - from physical danger,
  - from loss of face,
  - from embarrassment.
- Attention.
  - to be treated with respect, regard & consideration.

Whose responsibility?
- Yours
- Your colleagues.
- Your organisation's.

Where do we affect P.R.?
- At work:
  - talking to customers face-to-face; on the 'phone; in correspondence.
  - by creating an impression of efficiency; tidiness & caring.
- Away from work:
  - talking about work to friends or strangers.
  - in your attitude to the organ'n

How do you improve P.R.?
- Be conscious of your customer's feelings, &
- How you affect him/her.
- Show interest in their wants & needs.
- Genuinely want to help.
- Admit to mistakes & let them be right.

How to improve P.R.
- Be enthusiastic, helpful & friendly.
- Listen to them & be understanding.
- Be open.
- Show you like your job.

Customers
- What do they think about us?
- What do we think they think about us?
- How do we find out?
- What do we want them to think about us.

FEATURES OF PROJECT MANAGEMENT

* ALTERING THE 'STATUS QUO'
* IDENTIFYING THE 'CUSTOMER' & THEIR NEEDS
* HELPING THE PROJECT MANAGER TO LIVE LONGER
* WHEN & WHERE ARE PROJECTS EFFECTIVE ?
* NECESSARY QUALITIES IN A PROJECT LEADER

ALTERING THE 'STATUS QUO'

Projects bring :-

- Momentary imbalance - so people need time to readjust.
- New requirements - necessitating change.

They have no 'steady state' but have identifiable 'phases'.
Staff & line personnel feel insecure & under pressure.
Projects are intentionally impermanent (at first).

THE 'CUSTOMER' & THEIR NEEDS

- Adapt to the customer's requirements → This is easier if the project is contracted.
- How much will the 'customer' spend?
- How long to achieve results?
- Are there well-defined objectives? → What other unformalized needs or desires may be identified ?

PROJECTS ARE EFFECTIVE when :-

- Cutting across departmental boundaries.
- When the task is isolatable, well-defined, achievable within the time specified.
- Introducing change - to show what can be achieved.
- Implementing change - to show how it can be achieved.
- When highlighting organisational issues.

HELPING THE PROJECT MANAGER TO SURVIVE

- Senior management must have wholehearted commitment to the project.
- Produce clear objectives, schedules, financial limits, etc. & specify results.
- Avoid subjecting the manager to scrutiny or control by a committee → Control by general management is more acceptable.
- Delegate to him/her the AUTHORITY TO ACT.
- Permit him/her to make decisions.
- Assign control over the resources available/needed to achieve the task.
- Inform the rest of the organisation of the 'freedoms'.
- Assign staff who are enthusiastic & equal to the task.
- Don't appoint a manager who loves order stability & bureacracy to manage the project.

Establish reporting procedures (feedback) :-
- what ?
- when & how often ?
- to whom ?

Let the manager plan the project with clear sub-goals to assign to his/her staff. Build in evaluation procedures. Maintain the relevance of the project to its original objectives & customer requirements.

QUALITIES OF A PROJECT LEADER

- Leadership → The capability to inspire & enthuse others and yet operate control.
- Honesty & integrity.
- Communication skills → Both interpersonal & systematic.
- Business management competence.
- Command of technological processes where relevant.
- Energy & resilience.
- Decision-making/problem-solving ability.
- Creativity & imagination.
- Knowledge of administrative procedures

CLERICAL WORK EVALUATION (C.W.E.)

- ✳ WHY MEASURE CLERICAL WORK?
- ✳ WHAT IS THERE TO MEASURE?
- ✳ WHEN TO MEASURE IT?
- ✳ HOW TO MEASURE IT?
- ✳ STAGES IN C.W.E.

Clerical work is a feature of sales-, wages-, accounts-, personnel- & general offices. Stores, stock & production control. Goods inward, packing & despatch. Data processing, etc. It is so widespread in any organisation that it merits critical evaluation

WHY MEASURE CLERICAL WORK?

- Cost savings – prevent staff increasing,
  – improve performance,
  – work rationalisation.
- Staff benefits – job enrichment,
  – regrading with New Tech.,
  – individual & group incentives.
- Job evaluation & job descriptions produced.
- Assists method study by highlighting high cost areas.
- Manpower planning – staff increases or reductions.

WHAT TO MEASURE?

- Quantifiable throughput.
- Routine work.
- Repetitive work.
- Group work.

STAGES IN CLERICAL WORK ANALYSIS

- Communication
- Fact Finding
- Measurement
- Application

WHEN TO MEASURE IT?

- Before a Method Study Project. Identifies areas of possible savings which would benefit from method study.
- After a Method Study Project. Enables standards to be set.

HOW TO MEASURE IT

- Time study – for highly repetitive jobs.
- B.A.S.I.S (Booking & Sampling for Indirect Standards) Divides work into tasks; allocates time to tasks by job diaries; identifies working/idle time by Activity Sampling.
- P.M.T.S. (synthetic time data). Expensive & too accurate; diluted by office contingencies.

APPLICATION

- Assess staff requirements.
- Provide labour summary.
- Identify areas of saving
- Communicate; implement; & monitor change.

MEASUREMENT

- Analyst observes work in depts.
- Assists staff training in job booking & associated data collection.
- Work units produced.

COMMUNICATION

- Discussions with management; supervisors; union reps., & the staff concerned:–
  · reasons for C.W.E.,
  · possible outcomes,
  · nature of their involvement.

FACT FINDING

- Organisation. What are the jobs, how are they allocated?
- Characteristics of the work. Work flows & fluctuations.
- Output units.
- Task & work units. Link tasks to output units. Specify task measurement.

WHO IS INVOLVED?

- Management, must have clear objectives covering:
  – reasons for the study,
  – likely results,
  – effects of the study.
- Staff must be told:
  – reasons for the study,
  – likely results (benefits & problems)
  – effects on workload, staffing etc.
- Analysts concerned.

PAPERS
A77 – Clerical Work Evaluation
C.94–99, 130: C.W.E. exercises

PART 5 CONSULTANCY

The Consultancy Assignment	
Consultancy Development	6.29
Stages in a Consultancy Assignment	6.30
Consultancy Assignment 1 - Surveying	6.31
Consultancy Assignment 2 - Plg., Doing & Controlling	6.32
	6.33

PART 6 TRAINING

Training	
Basic Training & Development	6.34
Running a Training Section	6.35
Training needs & Ways of meeting them	6.36
Questions on Management & Supervisory Training	6.37
Course Preparation 1	6.38
Course Preparation 2 - Personal Wants	6.39
Training Design Algorithm 1 - Attitude Formation	6.40
Training Design Algorithm 2 - Comprehending	6.41
Training Design Algorithm 3 - Reflex Development	6.42
Training Design Algorithm 4 - Memory & Procedure Learning	6.43
How to Structure a Training Session	6.44
Discussion Groups	6.45
Individual & Group Discussions	6.46
Evaluation of Training	6.47
How People Learn	6.48
Teaching Preparation	6.49
	6.50

PART 7 KEYWORD INDEX

Keyword Index	
List of associated papers	p 51
	p 54

Contents

PART 1 PROJECT MANAGEMENT

Stages in an O & M Project	6.01
Project Planning	6.02
Project Management (O & M)	6.03
Project Evaluation	6.04
Project Appraisal	6.05
Project Management 1 - Planning Objectives	6.06
Project Management 2 - Financial Objectives	6.07
Project Management 3 - People needs	6.08

PART 2 CHANGE

Introducing Change	6.09
Management of Change 1	6.10
Management of Change 2	6.11
Management of Change 3 - People Problems	6.12
Management of Change 4	6.13
Managing Change Successfully	6.14

PART 3 PLANNING

Corporate Planning & Decision Making	6.15
Finance & Cost Control	6.16
Design of Information Systems	6.17
Forecasting	6.18
Pareto Principle	6.19
Controlling Work - Process	6.20
Controlling Work - Techniques	6.21
Public Relations 1	6.22

PART 3 INDUSTRIAL RELATIONS

Industrial Relationships	6.23
Complaints & Grievances	6.24
Maintaining Discipline & Morale	6.25
Interdepartmental Conflict	6.26
The Anatomy of Conflict	6.27
Discussion Paper on Conflict	6.28

The following typed (A4) information papers, forms and exercises accompany certain of the Outlines in Volume 6. Their value lies in the way they expand on aspects of the Outlines themselves. Their use is optional.

INFORMATION PAPERS

A.6	Role & Practice of Management Consultancy
A.12	Basic Aims & Policy
A.14	Forecasting, Strategic Planning & Corporate Strategy
A.15	Long range & Short term plans
A.24	Problem Analysis
A.25	Decision making
A.29	Management of Change
A.31	Network Analysis
A.39	Market & Sales Forecasts
A.46	Forecasting Buffer Stocks
A.95	Motivation & Leadership
A.100	The role of the internal consultant
A.157	Surveying
A.165	The Assignment. Planning, doing & controlling
A.184	Costing & Evaluating Training
A.192	The structure of planning
A.197	Financial Modelling
A.204	O & M Projects management
A.212	Office Layout
A.257	Project Management - Technical Feasibility
A.258	Project Management - Operating Suitability
A.260	- Financial Viability
A.265	- Planning & Controlling Costs
A.273	Statistical techniques for marketing
A.275	Surveys. Preparation & Information collection
A.352	Memory, learning & the psychology of study
A.361	Setting Personal Goals
A.377	The Lecture Method
A.379	How to set lesson objectives
A.381	Teaching Older Students
A.383	Giving & Receiving Feedback
A.394	Survey & Feedback
A.400	Force Field
A.402	Project Evaluation
A.403	Exponential Smoothing
A.446	Helping & Consulting
A.456	Decision tree analysis
A.459	Teaching Students to learn & Remember
A.460	How to lead a discussion
A.468	Feature card display

A.479	Information storage & retrieval
A.487	Evaluation of Training
A.491	Labour Summaries
A.492	Learning by Doing
A.515	Corporate Planning
A.533	The approach to a consulting assignment
A.567	Coding & Classification
A.580	Training Design Algorithm (CRAMP)
A.598	Intergroup Behaviour
A.609	Coaching
A.623	Dealing with Differences
A.643	Appraisal interviews
A.672	Counselling
A.754	Dealing with Conflict
A.1103	Delegation

EXERCISES

C.79	Production Control
C.106	Exponential Smoothing
C.146	Forecasting
C.170	Forecasting for I M R
C.178	Single exponential smoothing
C.233	Training Record Sysytem
C.244	Self Management

FORMS

F 40 - 45 ; 66

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STAGES IN AN O.&M. PROJECT

* What are they ?
* Why are they required ?

WHAT ARE THE STAGES ?

- Survey & agree the investigation.
- Collect & record the facts.
- Analyse the facts & design new procedures.
- Agree & install the new procedures.
- Check the results.

SURVEY & AGREE INVESTIGATION

- Lay down objectives.
- Get staff & mgt. used to O.&M.
- Enable mgt. to evaluate project.
- Enable O.&M. to programme load.

SURVEY & AGREE INVESTIGATION

- Define objectives.
- Outline alternative solutions.
- Programme project.
- Assess feasibility.

COLLECT & RECORD THE FACTS

- Know & understand methods & skills used.
- Attitude to change.

COLLECT & RECORD THE FACTS

- Collect info^n. by interview, questionnaire & from records.
- Record info^n. so that it is readily recorded checked & assimilated.

DESIGN THE SYSTEM

- So that it works in practice :-
  - involve staff
  - consider staff
  - consider objectives

DESIGN THE SYSTEM

- So that mgt. are satisfied with :-
  - the justification of their investment.
  - the implications of the solution.

AGREE & INSTALL THE NEW SYSTEM

- So that problems are forseen and action taken to avoid them.

AGREE & INSTALL THE NEW SYSTEM

- Consider what has to be done & when.
  - PEOPLE - training & recruitment
  - THINGS - hardware & software,
    - acquisition & design.
  - TIMING - schedule & progress.

CHECK THE RESULTS

- To make certain aims are achieved.
- To learn for future projects

CHECK THE RESULTS

- See if aims are being achieved.
- Modify if necessary.
- Get out.

Project Planning

DEFINE OBJECTIVES

PLAN OPERATIONS

EVALUATE ALTERNATIVE SOLUTIONS

SELECT FROM ALTERNATIVES

See papers:-
A31 Network Analysis
A257 P.Mgt.- Technical feasibility
A258 P.Mgt.- Operating suitability
A260 Financial Viability

DEFINE OBJECTIVES

* Why should objectives be defined carefully ?
* How should objectives be defined ?
* When should objectives be reviewed ?

PLAN OPERATIONS

* How can the sequence and timing of operations be planned ?
* What techniques are available to help plan the necessary operations ?

EVALUATE ALTERNATIVE SOLUTIONS

* Technical feasibility
  - can it be done ?
  - what problems are expected ?
* Operational suitability
  - is the method acceptable ?
  - are the resources available ?
* Financial viability
  - is the money available ?
  - is the return worth it ?

SELECT FROM ALTERNATIVES

* How can you weigh the effect of alternative solutions ?

- ranking systems
- consider the effects on different people of change

PROJECT OBJECTIVES

* Unambiguous
* Technical parameters quantified
  - quality
  - time
  - cost
* Essential objectives
* Desirable objectives
* Unnecessary objectives

PROJECT OPERATION PLANNING

* Network analysis
* Bar charts

* Plan the project so that effort and resources are used as effectively as possible.
* Greater objectivity on project planning shows up problems before they cause disruption.

PROJECT CONTROL

To give an early warning of delays so that action can be taken

To concentrate effort on to problem areas

To improve the planning of future projects by:-

- better forecasting
- better anticipation of problem areas

PROJECT MANAGEMENT (O&M)

* Establish clear objectives
* Plan & control the project
* Maintain high professional standards
* Ensure the implementation is well planned
* Consider people

REASONS FOR AN O.&M. PROJECT

- Problems arising ?
- New job; training required.
- Existing jobs...a need to
  - reduce costs.
  - simplify, deskill & mechanise.
  - improve the service (speed up / greater accuracy / firefighting / making secure)

HOW ARE PROBLEMS RECOGNISED ?

- Management
  - Knows something is wrong.
  - Thinks something is wrong.
  - Feels something is wrong.

PROBLEMS ARE EASIER TO RECOGNISE WHEN STANDARDS ARE ESTABLISHED.

PROJECT PLANNING

- Estimate time. → TIME
  - Don't set unrealistic targets for political reasons.
  - Don't plan to use overtime if it is avoidable.
- Provide check points. → CHECKPOINTS
  - Keep a job diary (see F44,45)
  - Computer controlled network.

PROJECT CONTROL, to prevent

- Over-running time,
- Over spending budget.....

....and so that action can be taken to rectify problems:-

- revise objectives,
- replan time,
- bring in additional staff,
- stop the project !

CONSIDER PEOPLE

- Consult. → CONSULT
  - Seek help & encourage suggestions.
- Persuade. → PERSUADE
  - Be considerate. (avoid arrogance & flippancy)
  - Consider attitude to change. (fear of loss of face & incompetence)
  - Inform on progress.
  - Sell ideas. (consider how to present them.)
- Design - for people → DESIGN
  - for real people... not too sophisticated, not too childish.

IMPLEMENTATION

- Plan & monitor implementation.
- Make sure people know what is happening through...
  - staff meetings.
  - training.
- Check savings are being made.

MAINTAIN STANDARDS

- Have an open mind - avoid prejudging
- Be methodical & thorough.
- Use a logical careful approach to problems.
- Be honest.
- Be unbiased by politics & tradition.
- Be realistic & practical with solutions.

PAPER :-
A 204 - O.&M. Project Management
F 44 & F 45

PROJECT EVALUATION

* Aims of the Project
* Alternative ways
* Comparing alternatives

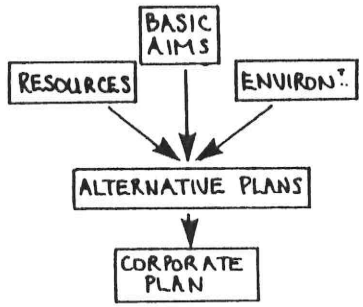
AIMS OF THE PROJECT

- Define the type of project.
- Identify its aims

TYPE OF PROJECT	AIMS
EXPANSION	- Broaden Scope. - Increase turnover. - Use other resources better. - Reduce dependency.
REPLACEMENT	- Reduce downtime. - Increase throughput. - Reduce manning. - Reduce dependency.
INCREASED EFFICIENCY	- Reduce costs of people, scrap, services.

IDENTIFY AIMS

- How does this project....
  - fit in with the corporate aims?
  - justify its use of resources?
  - improve the org$^{n's}$ prospects?



IDENTIFY AIMS

Identify aims carefully:-

- Do aims really justify the costs & disruption.
- Is this the best way to spend the money?
- Does this work balance with other work?

COMPARING ALTERNATIVES

- Quantifiable benefits/costs.
- Unquantifiable benefits/costs

UNQUANTIFIABLE

- The effects of :-
  - people,
  - inflation,
  - unreliable m/cs,
  - spares/service,
  - cost escalation

QUANTIFIABLE

- Costs & savings.
  - purchases,
  - installation costs,
  - running costs,
  - training costs,
  - maintenance & spares,
  - subsidies & grants.
- Evaluation techniques.
  - simple R.O.I. & payback,
  - D.C.F. - N.P.V. & I.R.R.,
  - risk, using decision trees or Monte Carlo simulation
- Time constraints.
  - use networks & bar charts to evaluate time constraints.
- Evaluation accuracy.
  - evaluate alternative plans with progressively more accurate estimates.

PAPERS:-

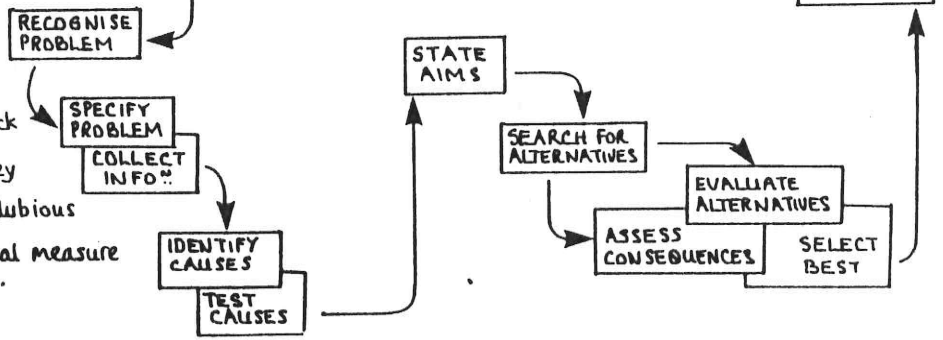
- Brainstorming & Synectics
A.2425 - Prob. Anal^{s} & Decision Making.
A.147 - Financial Modelling.
A.402 - Project Evaluation.
A.456 - Decision Tree Analysis

ALTERNATIVE WAYS

- Identify different methods.
  - Use problem analysis & decision making cycle
  - Use brainstorming & synectics. (S.251e)
- Identify different suppliers.
  - Use trade directories or seek recommendations.
  - Assess reliability, short & long term.
  - Assess experience.

EVALUATION TECHNIQUES

- Payback, neglects money after payback
- R.O.I, neglects advantage of money in sooner.
- N.P.V., based on dubious discount rates.
- I.R.R., an artificial measure of effectiveness.



PROJECT APPRAISAL

WHAT INFORMATION IS REQUIRED ?

* BY THE PROJECT OFFICER
* BY THE COMPANY

INFORMATION REQUIRED BY THE PROJECT OFFICER

- AIMS of the work.
- COSTS of the project.
- REVENUE from the project.
- COMPETENCE of the company.

AIMS OF THE WORK

- OBJECTIVES & BENEFITS to the company & the country.
- TECHNICAL DEVELOPMENTS & PATENTS foreseen.
- Work to be done & problems to be overcome.
- Chances of success.
- Can the benefits be achieved in any other way ?
- What PERFORMANCE is expected.

COMPANY COMPETENCE

- Technical.
- Commercial.
- Marketing.
- Previous experience.

COSTS OF THE PROJECT

- People costs.
- Material costs & parts.
- Indirect costs.
- Promotional costs.
- Plant & equipment.
- Building / relocation costs.
- Total costs.
- Time penalties.
- Total requested.
- Has anyone else been approached ?

INFORMATION REQUIRED BY THE COMPANY

- What funds are available ?
- What 'strings' are attached ?
- What safeguards are there ?

WHAT FUNDS ?

- What proportion of the costs will be met ?
- What is available for....
  - capital expenditure,
  - plant & equipment,
  - hiring or training personnel,
  - consumables, travel, etc.
- What must be repaid ?
  - when ?
  - at what interest rate ?

WHAT SAFEGUARDS ?

- Who gets the patent & design rights ?
- How are existing know-how & product features protected ?

WHAT STRINGS ?

- How much interference :-
  - by management,
  - by bureaucracy, &
  - paperwork requirements,
- Who gets the patent and/or licensing rights ?
- If central government / administration want to use the idea.....
  - will they pay a license fee ?
  - are they entitled to free use ?

REVENUE FROM THE PROJECT

- What market potential ?
- How was the market assessed ?
- How will it be exploited ?
- Manufacturing costs.
- Sales price & profit.
- Royalties / license fees.

CRITERIA FOR JUDGING SUBMISSIONS

- Will the project be seen to :-
  - reinforce the administration's / government's strategy for manufacturing industry ?
  - be exploited by industry (when ? 5→10 yrs !)
  - improve manufacturing performance ?
  - increase competitiveness (home/abroad)
  - conserve energy; resources.
  - be safe & not damage the environment.
  - benefit employer & employees.

PROJECT MANAGEMENT

* Planning needs
* People & task needs

(See 8.08)

PLANNING NEEDS

- Why plan ?
- Setting objectives

WHY PLAN ?

- So that effort & resources are used as effectively as possible.
- Planning shows up problems before they cause disruption.

SETTING OBJECTIVES

- Financial objectives. (see 6.07)
- Time objectives. (see 6.03)

PLANNING ENABLES YOU TO :-

- Allocate & obtain resources.
- Monitor progress & performance.
- Co-ordinate different plans.
- Agree objectives & scope of project.
- Motivate staff to achieve aims.

ALLOCATE & OBTAIN RESOURCES

- Internal & external resources.
- Men ; machinery ; money ; space ; materials.
- Allocate responsibility.
- Delegate tasks.

MONITOR PROGRESS AGAINST PLANS

- To take prompt action.
- To make better plans next time.

CO-ORDINATE DIFFERENT PLANS

- Establish priorities.
- Establish long-term plans.
- Authorise start & finish dates.

MOTIVATE STAFF

(See 7.03 Motivating Employees)

AGREE OBJECTIVES

- Identify key events.
- Identify objectives of individual projects.
- Identify objectives of groups of projects.

A257 - P. Mgt. - Technical feasibility
A258 - P. Mgt. - operating suitability
A260 - Financial viability

A31 - Network Analysis Techniques
A204 - Mgt. of O. & M Projects

PROJECT MGT. - FINANCIAL OBJECTIVES

* MANAGEMENT ACCOUNTING
* CASH-FLOW PROJECTION
* PRE-REQUISITES

MANAGEMENT ACCOUNTING

- Providing financial standards against which management can monitor performance.

CASH FLOW PROJECTION

- Forecasting future money requirements & sources of money to meet these requirements.
- Monitoring the cash flow position to show up problems at the earliest possible time.

WHAT STANDARDS DO YOU REQUIRE ?

WHAT ACTION ARE YOU GOING TO TAKE ?

WHAT INFO.ⁿ DO YOU NEED TO DECIDE ON THIS ACTION ?

WHAT INFO.ⁿ IS AVAILABLE ?

WHAT INFO.ⁿ MUST BE COLLECTED ?

WHERE WILL I GET IT ?

For management accounting to work, what is required by the system ?

- **COMMITMENT** - by senior management
- **OBJECTIVITY** → clear financial objectives; clear definition of responsibility; yardsticks of performance
- **KNOWLEDGE** - of the information requirements
  - Control reports,
  - Accounts coding,
  - Requirements on accuracy & time
- **STAFF INVOLVEMENT**

PROJECT MANAGEMENT

PROBLEM AREA 1
(Clash of interests between group & task needs)
- a need to look after all the group.
- possible need to break up group for higher efficiency

PROBLEM AREA 2
(Clash of interests between group & individual needs)
- a need for group solidarity
- need for individuality & growth in the job.

* PROJECT MANAGEMENT HAS NEEDS....
- People needs.
- Task needs.

MANAGEMENT Action
- Meet group needs by:
  - Team building,
  - Developing interdependance,
  - Briefing & informing,
  - Involving them in the task.
- Meet task needs by:
  - Planning.
  - Evaluating.
  - Controlling.
- Meet individual needs by:
  - Motivating, supporting & developing.
  - Communicating, briefing & informing.

* PROJECT MANAGEMENT FUNCTIONS
- Communication
  - briefing,
  - informing,
  - supporting.
- Direction
  - planning,
  - evaluating,
  - controlling.

MANAGEMENT COMMUNICATIONS
- Written
  - Memos; reports.
- Spoken
  - Presentations; meetings.

PROBLEM AREA 3
(Clash of interests between task & individual needs)
- need to de-skill & remove job freedom.
- need for job satisfaction & individual advancement

MANAGEMENT TECHNIQUES
- Management by Objectives.
- Network Analysis.
- Information system design.

PAPERS:-
A.95 - Motivation & Leadership
A.249 Project Management
→ A.269 Papers

INTRODUCING CHANGE

- What problems are associated with change?
- Planning & implementing change
- Organisation development
- Culture shock.

FACTORS INFLUENCING CHANGE

Potential causes :-
- Economic / resource shortage.
- Legislative / government.
- Competition / market forces.
- Technical / technological.
- Educational / expectations.
- Sociological / consumerism / I.R.

ACTIONS WHICH CAN BE TAKEN

- Training / retraining.
- Communicating / involving.
- Job enrichment.
- Career planning
- Re-establishing a degree of loyalty.
- Education / re-educ^{n}.

SYMPTONS

- Helplessness & dependence.
- Refusal to learn the language.
- Reject the alien environment.
- Ethnocentricism.
- Fear of contact, for the person.

OVERCOME IT.

- Recognise it as a real problem.
- Patience & understanding.
- Combat ethnocentricism.

ORGANISATION DEVELOPMENT

- Definition.
- Process.
- Benefits.

PROCESS

* Unfreezing - develop an awareness of the need for change & establishing the relationships needed for successful change.
* Moving (changing).....
  - defining problems,
  - identifying solutions,
  - implementing solutions.
* Refreezing.....
  - stabilizing the situation
  - building relationships.

DEFINITION :-

O.D. is an approach to the introd^{n} of change in the organisation.

O.D. assists the organisation to benefit from changes in the environment & the dynamics of its own evolution.

It observes that :-
- people & organ^{ns} cling to roles & objectives even when the situation requires change.
- at times of change people don't commit to the change & hence work from diff^{t} assumptions & towards different goals.

BENEFITS OF O.D.

- a plan taking realities into account.
- a definition & acceptance of objectives.
- integration of personal & organisational objectives.
- clearly defined roles.
- cooperation.

PLANNING & IMPLEMENTING CHANGE

- Why do people resist change?
- How to help people accept change.
- How to follow-up after change.

WHY DO PEOPLE RESIST?

- Insecurity (status, job, differentials)
- Fear of
  - criticism
  - loss of workmates
  - loss of skill, money, etc.
- Difficulty in learning new skills.
- Loss of job interest.

HOW TO FOLLOW-UP

- see how they are coping.
- channel communications both ways.
- prevent regression.

HELP PEOPLE ACCEPT CHANGE

- Consider how it effects them.
- involve them, communicate frequently.
- be firm but flexible & gradual.
- monitor the change.
- develop a "change" philosophy.
- plan carefully.

HOW TO USE PLANS

- employ network analysis & "countdown" principle.
- avoid undue haste.
- inspire confidence by.....
  - well thought-out plans,
  - forestalling problems,
  - allow time for explanations.

MANAGEMENT OF CHANGE 1

* WHY IS CHANGE OPPOSED ?
* WHAT WILL MAKE CHANGE WORK ?
* WHAT DO PEOPLE WANT FROM THEIR JOBS ?

PAPERS
A.29 - Management of Change
A.296 - The implementation of a new system.
A.317 - Training in Office Procedures
Film - "Communication in Industry"

CHANGE IS OPPOSED because :-
- It makes people feel insecure
- It makes people work harder.

See 6.14 'Managing Change Successfully'

PEOPLE WANT

Recognition
- respect from peers & superiors,
- their own recognition of the worth of their jobs.

Advancement
- to more important work,
- to harder work,
- to different work.

Interest
- a mental challenge,
- using their own discretion,
- using a skill & taking pride in their work.

Security
- fear of losing face reduced,
- fear of losing territorial or material possessions reduced,
- able to handle the situation.

HOW WILL THE CHANGE THREATEN THESE ?

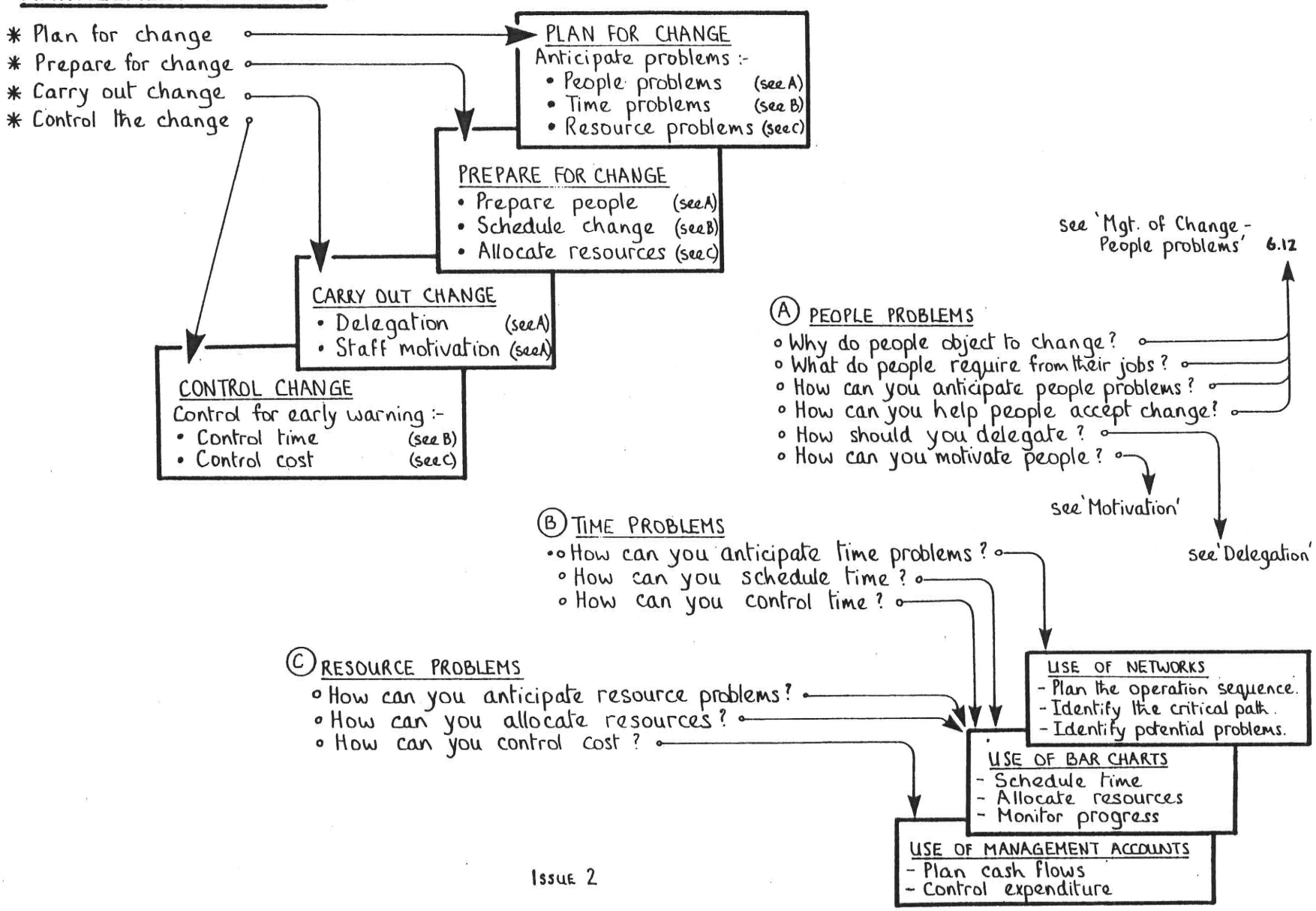
HOW MAY CHANGE AFFECT 'WORK' ?
- Physically,
  - move to a new site ?
  - need to move house ?
  - travel patterns changed ?
- Mentally,
  - break in routine ?
  - learning new methods ?
  - meeting new colleagues ?
  - losing friends ?
  - disruption at home ?
  - organising the change ?

HOW DOES THE CHANGE AFFECT THE ACTUAL WORK TO BE DONE ? See 6.13 'Mgt. of Change' 4

HOW WILL PEOPLE ACTUALLY KNOW WHAT IS GOING TO HAPPEN & HOW IT WILL AFFECT THEM ? See 6.14 'Managing Change Successfully'

Issue 2

MANAGEMENT OF CHANGE 2



MANAGEMENT OF CHANGE 3 'PEOPLE PROBLEMS'

* Why do people object to change?
* How can you anticipate people problems associated with change?
* How can you help people to accept change?

PEOPLE'S OBJECTIONS TO CHANGE

- Change threatens
  - their present position
  - their prospects.
- Change requires
  - physical work.
  - mental work.

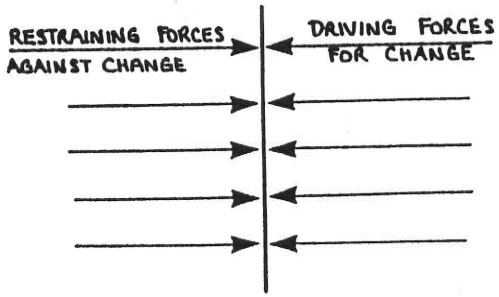
How can change benefit their job?	How can change appear threatening?	What do people require from their jobs which change can threaten?
Enriching Broadening Giving discretion	Deskilling Impoverishing Removing discretion	Interest in their job - using a skill. - having a mental challenge. - using their discretion.
Upgrading Increasing resp^{y}. Change of scene	Blocking promotion Removing jobs Revising jobs	Growth in their job - to more important work. - to harder work. - to different work.
Improved reward Improved status	Rejecting earlier work Rejecting ideas	A worthwhile job - recognised by self. - recognised by others.
Training for job Easier job Permanence of job Better conditions	Incr^{s}. apparent difficulty Appearing stupid Redundancy Degrading	A secure job - ability to handle the job. - fear of losing face. - fear of losing job. - fear of losing possessions

HELPING PEOPLE ACCEPT CHANGE

- Involve them by :-
  - discussing it with them,
  - foster their ideas.
- Communicate by means of :-
  - meetings & discussions,
  - presentations,
  - training.
- Recruit & transfer in good time.
- Avoid work peaks & consider convenience. (Parallel running & pilot schemes)
- Consider people's worries - think about :-
  - individual's objections & how you will meet their fears.
  - the benefits of change & how to sell them.

ANTICIPATING PROBLEMS OF CHANGE

"FORCE FIELD" ANALYSIS



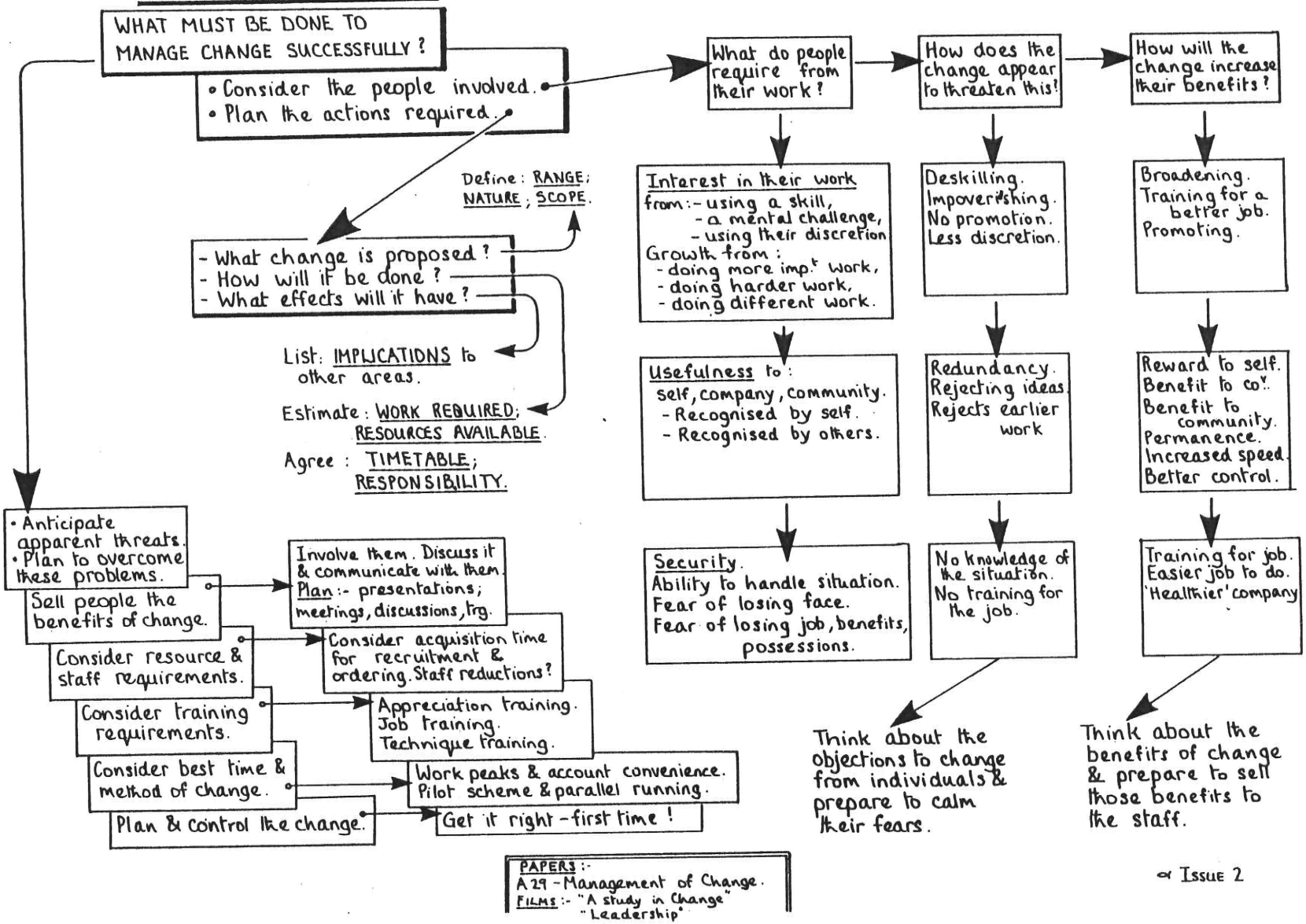
CHANGE PROCESS

- Identify & remove restraining forces.
- Carry out change.
- Freeze the situation by reinforcing the new behaviour.

PAPERS :-
A 400 - Force Field

ISSUE 2

MANAGEMENT OF CHANGE 4



PAPERS :-
A 29 - Management of Change.
FILMS :- "A study in Change"
"Leadership"

cf Issue 2

MANAGING CHANGE SUCCESSFULLY

* MOTIVATE STAFF
* PLAN CHANGE
* DELEGATE

MOTIVATE STAFF
- Sell the staff the benefits of change;
  - Involve them,
  - Discuss it with them.

Plan Communications with :-
- Oral presentations.
- Explanatory memoranda,
- Meetings.

REMEMBER

You have been thinking of the problems longer than your audience so :-
- You need to convince them.
- Do not become irritated.

Selling the benefits
- Security .....
  - for this section,
  - for the company,
  - but mainly for themselves.
- Appearances ....
  - how others will see us,
  - how we take responsibility
- Performance .....
  - long term effects on costs; time; reduced trouble; etc.
  - savings in money; time to do the job; to see results; to get better control; etc.
  - rewards to self in form of money; job satisfaction; etc.

DELEGATE
- To involve staff more.
- To remove part of your load.

PLAN CHANGE
- What change is proposed ?
- How will it be done ?
- What are the implications ?

- Define the range, scope & nature of the proposed change.
- Estimate the work required.
- Assess resources available for implementation.
- Prepare a timetable for change.
- Define authority & responsibility
- Agree the timetable.
  - Consider the method (pilot scheme or parallel running, etc.)
  - Consider the the time, remembering work peaks, etc.)
  - Consider possible training requirements in job; appreciation; techniques; etc.
  - Consider staffing implications - recruitment or redundancy; etc.

- List the implications for other activities & processes.

Success is vital

Preparation, persuasion & communication may take time but the alternative may be failure.

CORPORATE PLANNING & DECISION MAKING

* BASIC OBJECTIVES
* ENVIRONMENTAL ANALYSIS
* OPPORTUNITY ASSESSMENT
* CORPORATE GOALS
* CORPORATE STRATEGY
* ACTION PROGRAMMES
* SHORT-TERM PLANS

BASIC OBJECTIVES

- The fundamental reason for the existence of the organisation :-
  - profit,
  - growth of assets,
  - obligation to employees,
  - obligation to the community,
  - maintenance of individuality.

ENVIRONMENTAL ANALYSIS

- Changes in the economy → ECONOMIC CHANGES
  - Population growth.
  - National income.
  - Disposable income.
- Changes in the market → CHANGES IN THE MARKET
  - Trends in demand.
  - Price levels.
  - Economic & social devts in outlets.
  - Competitors
    - plans,
    - strengths,
    - market share.
- Changes in production technology → CHANGES IN PRODN TECHNOLOGY
  - Changes in prodn methods.
  - Changes in distribn methods.
  - Changes in customer technology.

SHORT-TERM PLANS

- Setting budgets at departmental or sectional level to monitor progress.

PAPERS :-
A.12 - Basic aims & policy.
A.14 - Forecasting, strategic Plg. & Corp. strategy.
A.15 - Long range & short-term plans.
A.19 - The structure of plans.
A.515 - Corporate planning.
FILM :- 'Focus the Future'

ACTION PROGRAMMES

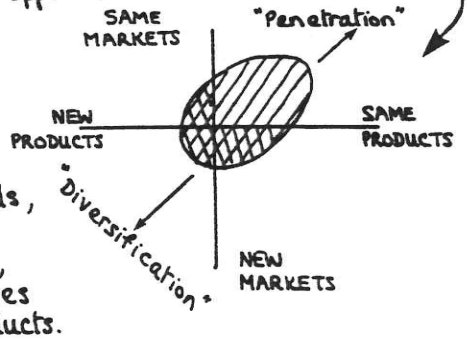
- Long range plans
  - main decisions & time scales,
  - actions & time scales,
  - costs & profits.

CORPORATE STRATEGY

- Marketing.
  - Market share & dates,
  - Product & market profitability.
- Product.
  - Product mix changes,
  - R. & D. work.
- Growth.
  - Acquisition,
  - Diversification.
- Finance.
  - Fund raising,
  - Investment.
- People.
  - Organisation changes,
  - Recruitment.
- Facilities.
  - Obsolescence,
  - Purchase

OPPORTUNITY ASSESSMENT

- Analysis of product contribution & potential.
- Examination of production resources:-
  - cost trends,
  - age structure,
  - staff needs,
  - raw material needs.
- Analysis of new product potential & development costs.
- Analysis of organisation structure
  - management skills,
  - succession & wastage,
  - extra potential load.
- Analysis of financial strength
  - liquidity & sources of finance.
- Examination of opportunities for diversification.



CORPORATE GOALS

- Setting quantified goals,
  - profit objectives,
  - growth objectives,
  - contribution objectives from different products.

FINANCE & COST CONTROL

* Finance & cost control
* Cost control techniques
* Supervisor's role

THE SUPERVISOR'S ROLE

- Recording
- Cost control

COST CONTROL -
- Communicate the need for cost control. Involve subordinates; invite their suggestions; reduce waste; reward good practice.
- Cost reduction by good man management; careful scheduling: maintenance regularly etc; reducing the need for overtime; less absenteeism; better quality.

RECORDING - reports on
- Material usage; utility usage; control data to calculate labour costs; overheads; machine costs; work in progress; etc.

COST CONTROL TECHNIQUES

- Cost reduction using value analysis techniques
- Management by exception

Focus attention on items where variances are significant.

VALUE ANALYSIS

- **Aim** - reducing costs while keeping the value the same or better.
- **Method** - question, what costs does it generate?
  - material costs,
  - handling & storage costs,
  - machinery costs,
  - labour costs

Question - what value has it?
- use value
- esteem value

Collect cost-cutting ideas from consultants, operatives, customers, research, etc. & develop a questioning attitude towards your job.

FINANCIAL & COST CONTROL

- Definitions
- Cost accounting
- Financial reports
- Managerial reports

FINANCIAL CONTROL is concerned with where money is being spent.
& **COST CONTROL** is concerned with how much we spend on a particular service or activity.

BUDGETS are the estimated costs for each activity.
VARIANCES are the differences between actual & budgeted costs

FINANCIAL REPORTS

- Income statements report income & costs incurred during an accounting period.
- Balance sheets show a picture of the financial position of a firm at a given date.

Included would be :-
- fixed & current assets,
- long- & short-term liabilities.

COST ACCOUNTING involves determining costs - for planning,
for organising,
for measuring & controlling, &
for evaluating.
This is done by recording ....
labour costs,
material costs,
overheads, &
distribution costs.

MANAGERIAL REPORTS

- Budgets - look forward (projection),
  - around (usage),
  & - backwards. (feedback)
- Cash flow statements - show the state of cash (or relative liquid) assets available at a particular time.
- Capital budgets - show departmental overheads generated by the use of fixed assets (machinery, equipment, etc.)

FILMS :-
'BALANCE SHEET BARRIER'
'BUDGETING FOR GROWTH'

USE VALUE (= functional use)
ESTEEM VALUE (attractiveness)

The product is the sum of many parts, each as cheap as effectiveness will allow. Design features must please the buyer & stimulate the desire to purchase it.

The supervisor has some control over direct costs, i.e. the cost of the product's production.
His control in other areas is less significant,
e.g. Fixed Costs (Admin.; Insurance; Maintenance; etc.) & Variable costs (Material costs; Labour rates; overheads; etc.)

It is usual to operate 'volume-cost analysis' - reducing figures to the cost of producing one unit.

ISSUE 2

DESIGN OF INFORMATION SYSTEMS

* What information do you need?
* Where does it come from?
* Where & how to store it.

WHAT INFO^{N}. DO YOU NEED?

- Technical information.
- Client information.
- Management information.

WHY COLLECT INFORMATION?

- To take DECISIONS or ACTION.

WHAT INFO^{N}. IS REQUIRED?

- What DECISIONS / ACTION will you take?
- What information do you need?
- What info^{n}. is available?
- From what source?
- What info^{n}. must be collected? (from where; by whom & how?)

TECHNICAL INFORMATION

- What subjects do you want to cover?
- Who needs to have access?
- Who will look after it? (collect; update; lend; retrieve)
- What other facilities can you use?

CLIENT INFORMATION

- What do you need it for?
  - records of contracts.
  - record of services / products.
  - contact address list.
- Who needs to have access?
- Who will look after it?

MANAGEMENT INFORMATION

- What jobs are you doing?
- What decisions do you take?
- What information do you need?

WHERE & HOW TO STORE IT

- Indexing / classification
  - standard system?
  - own system?
- Filing systems
  - Box files
    - Simple.
    - Kardex.
    - Vertical visible.
    - Top edge visible.
  - Cabinets
    - Vertical.
    - Lateral.
  - Miniature
    - Microfilm.
    - Microfiche.
- Retrieval

Effort / System	STORE	RETRIEVE	
		ITEM '?'	FEATURE '?'
FILE	EASY	HARD	VERY HARD
FILE + ITEM CARD	HARD	EASY	HARD
F + I. CARD + FEATURE CARD	HARDEST	EASY	EASY

WHERE DOES IT COME FROM?

- TECHNICAL INFO^{N}. comes from:
  - Magazines read.
  - Books read.
  - Abstracts read.
  - Colleagues.
- CLIENT INFO^{N}. comes from:
  - Correspondence.
  - Sales contacts.
  - Internal information.
  - Colleagues.
- MANAGEMENT INFO^{N}. comes from:
  - Standard returns.
  - Internal returns.
  - Own subjective judgement.
  - Colleagues.

KEY TASK	SUBSIDIARY TASKS	DECISIONS TAKEN	INFO^{N}. REQ'D	INFO^{N}. SOURCE
				(See F66)

TECH. INFO^{N}. - how can you safeguard your supply?
- Make certain you know what's going on in your field....
  - not too little.
  - not too much.

CLIENT INFO^{N}. - how do you update?
- By knowing the situation/ prospects now.

MANAGEMENT INFO^{N}. - how can you improve its quality?
- By getting the RIGHT info^{n}. at the RIGHT time with the RIGHT accuracy at the RIGHT cost.

PAPERS

A212 - Office Layout.
A468 - Feature cards capacity.
A479 - Information Storage & Retrieval.
A567 - Coding & Classification.
C233 - Training record system.
C244 - Self management.
F 40, 41, 42, 43, 66.

FORECASTING

* EXTRAPOLATION
* PREDICTION
* TECHNIQUES

EXTRAPOLATION
- Forecasting from PAST PERFORMANCE

PREDICTION
- Forecasting from Prediction of FUTURE EVENTS

TECHNIQUES
- Moving Average
- Exponential Smoothing

ELEMENTS of PAST PERFORMANCE
- Average performance.
- Trend - up or down.
- Seasonal patterns.
- Random fluctuations (noise).

FACTORS AFFECTING FUTURE PERFCE
- Introduction of new products (Ours & theirs)
- Sales promotions (Ours & Theirs)
- Changes in customer requirements.
- Changes in the economy (Credit scueezes; Consumer booms; Environmental legislation)

PREDICTING FUTURE PERFORMANCE uses :-
- Market Research/ Intelligence,
- Economic Projections,
- Life cycle Predictions.

FORECASTING
- Extrapolate from past performance & modify from prediction of future performance.

EXPONENTIAL SMOOTHING
- Forecast demand by :- 'Changing previous forecast by a "PROPORTION" of the difference between previous forecast & actual performance.'
- Setting "proportion' (α) so that large α reacts quickly, small α reduces fluctuations.
- Advantages :-
  - Easier arithmetic,
  - Errors self-correcting,
  - Reacts more quickly,
  - Sounds impressive!

MOVING AVERAGE
- Averages demand over 'N' periods.
- Move average 1 period each period.
- When 'N' small - average reacts quickly.
- When 'N' large - random fluctuations reduced.
- 'N' = season, seasonal fluctuations removed.
- Advantages :-
  - Easier to explain,
  - Less frightening name.

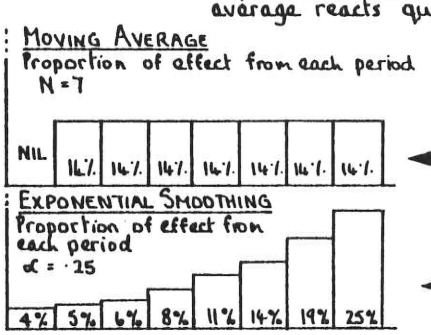
COMPARATIVE EFFECTS

Moving average 'N' v. Ext. smoothing 'α'

$$N = \frac{2-\alpha}{\alpha}$$

For equivalent 'N' & 'α', exponential smoothed average reacts quicker.

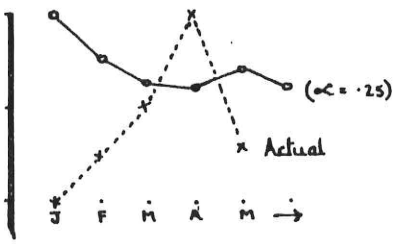
N	α
1	1
3	·5
5	·33
7	·25
9	·2
11	·16
13	·14
15	·125
17	·11
19	·1



(α = ·25)

PERIOD	FORECAST (F)	ACTUAL (A)	DIFFCE (F-A=d)	α × DIFF (α × d)	FORECAST (F − αd)
—	—	—	—	—	100
JAN	100	90	10	2·5	97·5
FEB	97·5	92·5	5	1·25	96·25
MAR	96·25	95	1·25	0·25	96
APR	96	100	(4)	(1)	97
MAY	97	93	4	1	96

etc.



EXERCISES	PAPERS :-
C.106 Exponential Smoothg.	A39 - Market & sales Forecasts.
C.146 Forecasting	A46 - Forecasting & Buffer Stocks
C.170 Forecasting for I.M.R.	A273 - Statistical Techniques for Marketing
C.178 Single Exponential Smoothing.	A403 - Exponential Smoothing

α Issue 2

PARETO PRINCIPLE

* What is it ?
* How to use it ?

THE PARETO PRINCIPLE

- In any series of elements to be controlled
- a selected small fraction in terms of numbers of elements
- accounts for a large fraction in terms of Effect

PARETO'S LAW

- VILFREDO PARETO (1842-1923) ITALIAN
- ECONOMIST & SOCIOLOGIST
- WORK ON INCOME DISTRIBUTION
- Small proportion of population received large proportion of income.

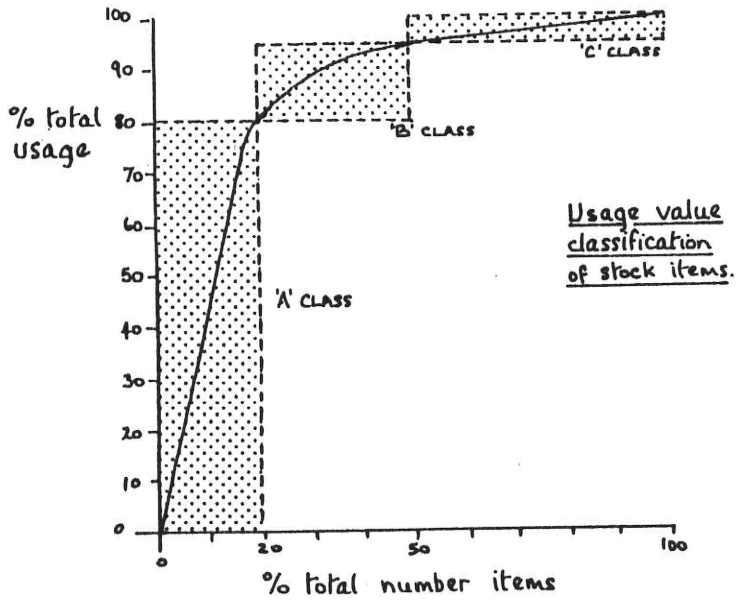
EXAMPLE :- Inventory control.

- Calculate annual usage of items.
- Extend to annual usage value.
- Rank items in order of their annual usage value.
- Allocate different inventory control systems to :-

'A' CLASS ITEMS - top 20% items ≑ 80% annual usage
'B' CLASS ITEMS - next 30% items ≑ 15% annual usage
'C' CLASS ITEMS - last 50% items ≑ 5% annual usage

'A' CLASS ITEMS - Tight control, requirement planning, free cover.
'B' CLASS ITEMS - Normal control, order point, "total cover"
'C' CLASS ITEMS - Minimum control, two bin, have "plenty"

a SMALL FRACTION of :-	Account for a LARGE FRACTION of :-
People	Wealth & Income.
Quality characteristics.	Customer complaints, Scrap & re-work.
Piece parts.	Obsolescence; Delivery delays.
Purchase orders.	Purchase value.
Customers.	Credit losses. Unjustified returns.
Decisions.	Total effect of all decisions
Management attention.	Effect of management
Record maintenance	Control of stocks



Usage value classification of stock items.

THE PARETO PRINCIPLE

- A, B, C analysis & 20:80 rule.
- Separate the VITAL FEW from the TRIVIAL MANY.
- Devote scarce resources to the VITAL FEW.
- Reduce the use of scarce resources to the TRIVIAL MANY.

CONTROLLING WORK (PROCESS)

* WHAT IS THE CONTROL PROCESS ?
* WHAT STEPS SHOULD IT FOLLOW ?
* HOW DOES IT RELATE TO PLANNING ?
* SUPERVISOR'S ROLE IN PLANNING

THE CONTROL PROCESS

- The control process is designed to monitor continually the outgoing activities & make changes in work characteristics to keep activities running as planned.

WORK CHARACTERISTICS

- Assignments.
- Instructions.
- Procedures.

CONTROL PROCESS - STEPS

- Set performance standards
- Collect data to measure performance
- Compare results with standards
- Take corrective action

SUPERVISOR'S ROLE

- Collecting control data
- Using control reports
- Controlling work

CONTROLLING OWN WORK

- What will be done ?
- Who will do it ?
- How will it be done?
  - collecting data,
  - monitoring results,
  - defining methods & procedures.
- How will problems be solved ?
  - with machines ?
  - with people ?

CONTROL REPORTS

- Variances will show where & when problems arise.

COLLECTING CONTROL DATA

- Collecting & checking time cards.
- Filling in/collecting prod.n tallies.
- Routine checks on quality.
- Observing work methods.
- Inventory control data.
- Maintenance data collection.

- Clarify responsibilities in writing.

PLANNING & CONTROL

- Plans show :-
  - what should be controlled
  - how it should be controlled
  - what standards should be set
- Controls give :-
  - Basic data for plans
  - Data to reshape goals
  - 'Variances' to question the plans

VARIANCES show something is not as we thought it should be - hence we question 'why'.

Present data may show a need for goals to be revised.

Past data - for future plans.

PERFORMANCE STANDARDS

- Standards should be measurable.
- Acceptable tolerances should be specified.
- Specify tolerance above & below.
- Standards can refer to :- time ; weight & size; finish; number of; composition ; etc.

PERFORMANCE STANDARDS

- A standard is a goal, expressed
  - clearly enough,
  - definitively enough,
  - measurably enough.....

to provide an exact measure to judge progress.

- Some standards cannot be measured & must rely on the judgement of the supervisor.

COLLECT DATA

- How ? count ; weigh ; analyse ; measure ; etc.
- From where ? (See Collecting Control Data)

COMPARE RESULTS

- How often ?
- Compare results with standards ⇒ variance

TAKE CORRECTIVE ACTION

- What caused the variance ?
- What result is wanted ?
- How can this be achieved ?

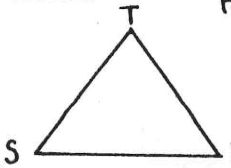
PROBLEM TREES can help identify the cause of the problem.

What result is essential ?
What results are desirable ?

Consider alternatives & evaluate them.

S.T.P. Model

TARGET = Where do we want to get to ?



SITUATION = Where are we now ?

PLAN = How we do it.

PAPERS :
A.491 - Labour Summaries
C.79 - Production Control

Issue 2

CONTROLLING WORK (TECHNIQUES)

* What types of control are there ?
* What areas should be controlled ?
* What standards should be set ?
* How should work be controlled ?
* How to control people ?

TYPES OF CONTROL

- Production (& operations) control
- Inventory control
- Quality control
- Financial control

PRODUCTION CONTROL

- Covers
  - employee performance
  - attendance records
  - rest periods
  - productivity
  - material (& parts) usage
  - energy usage
  - consumable stores usage
- All things which contribute directly to the cost of providing goods & services.

INVENTORY CONTROL

- Covers - the levels of stock held; work in progress.
  - the reorder quantities; frequencies.
- Balances the cost of holding stock with the cost of running out.

QUALITY CONTROL

- Covers - the level of complaints, rejections
- Balances the cost of excess quality with the cost of consumer dissatisfaction & material & labour wastage.

FINANCIAL CONTROL

- Covers the flow of money -
  - into the organisation (sales),
  - inside the organn. (added value)
  - out of the organn. (purchases)
- Gives warning of PROBLEMS of
  - cash shortages,
  - overall performance problems.

CONTROL AREAS

- Identify the most important goals.
- Which areas are most vulnerable?

CONTROLLING WORK

- Controlling Output:
  - know individual performances
  - drop in output shows problems in machines, training, morale.
- Controlling Methods:
  - specify methods
  - deviations from methods cause injury/accidents, waste/scrap.
  - train to rectify
- Controlling Admin.:
  - specify & communicate standards
  - observe lateness, absenteeism, etc.
  - check on frequent infringements
  - counsell employees.

SETTING STANDARDS

- External standards.
- Internal standards.

EXTERNAL

- set by specialists in quality control, accounting, prodn. scheduling.
- set by manager.

INTERNAL

- set by past performance, assumes past performance satisf.. assumes no change in conditions.
- set by thorough analysis (work study), attainable, useful.
- set by guesswork,
  - if too difficult.... could demoralise
  - if too easy..... slows production

- subsidiary standards set by supervisors in their own area

CONTROLLING PEOPLE

- People dislike being controlled.
- People are more self-controlled if:
  - they can set their own standards,
  - they are involved in setting them.
- People more likely to accept standards & control if they are seen to be FAIR.
- People are more helpfull if they know what's happening & can discuss it.
  → develop 2-way communication.

→ Good control is:
- acceptable,
- beneficial,
- NOT PUNITIVE.

PUBLIC RELATIONS 1

* What is meant by 'P.R' ?
* The objective of P.R.
* Why do we need P.R. ?
* Who is responsible for P.R.?
* Pointers to improved P.R.

WHAT IS 'P.R.' ?

It is concerned with all the relationships between an organisation & its public. It is NOT merely advertising nor is it just publicity.

DEFINITIONS

PUBLIC :-
The different group or groups of persons with whom an organisation has constant dealings. For a private company it would include labour unions; customers; stockholders; suppliers; etc. Every organisation has a specific 'public.'

RELATION :-
What one person or thing has to do with another – intercommunication.

PUBLIC RELATIONS
"The deliberate, planned and sustained effort to establish and maintain mutual understanding between an organisation & its public"
– INSTITUTE OF P.R. (UK)

OBJECTIVE OF P.R :-

To establish, improve & maintain a good relationship with the public.

WHY DO WE NEED P.R.?

- To maintain close contact with the public.
- To increase public understanding.
- To build confidence in the company & its products or services.
- To facilitate information flows in/out of organ^{n}
- To keep employees interested & motivated.

- Easier & prompt attention to grievances.
- Gain public support & feedback.

RESPONSIBILITY

- Departmental – P.R. officers in contact with T.V., Press, Radio & Publications.
- Employees in personal contacts by telephone, letter, meetings & through sales.

- Being efficient, helpful, courteous.
- Keeping the work environment clean & tidy.
- Observing safety & other regulations.
- Being openly supportive* of other depts. & company policies
- Maintaining discipline & morale

- Focus attention upon
  - policies, → Quality assurance, Profitability, Marketing, etc.
  - objectives,
  - programmes,
  - clients/customers, etc. → opinions, expectations, brand image, etc.

POINTERS TO IMPROVEMENT

Basic Q's to consider :-
- Who are important to us, & why?
- What would we like them to think?
- What do they think now?
- Are we at fault, need we change?
- If criticism is forthcoming & unjustified, is it due to ignorance or misunderstanding, & why?
- How best may we remove misunderstanding & ignorance?
- What are our short-term tactics?
- What long-term strategies?
- What is our detailed plan?

* outwardly

INDUSTRIAL RELATIONSHIPS

* Employees & Employers Organisations
* Employment Policy for good I.R.
* Recent Employment Legislation.
* Grievance & Discipline Procedures.

ORGANISATIONS

- Trade Unions
- Other employee organisations
- Employers organisations

TRADE UNIONS

- Role
  - bargaining
  - cooperating
  - securing justice

  } on behalf of members
- Recognition, when the co^. accepts the role of the union as above & will negotiate.

OTHER ORGANISATIONS

- Joint consultative assemblies.
- Professional organisations

GRIEVANCE & DISCIPLINE PROCEDURES

- Definition - a procedure is a set of defined steps which are, or should be followed when certain eventualities arise.
- Why have G. procedures ? - ensures fair airings of views by both parties & standardised handling processes.
- Why have D. procedures ? - ensures fair, rationalised & standardised handling of instances of misconduct &/or unsatisfactory work.

EMPLOYMENT POLICY FOR GOOD I.R.

- Use manpower planning effectively.
- Recruit & select not solely from outside the firm.
- Maintain an effective, 2-way communication system.
- Observe & implement training requirements.
- Maintain a fair & simple pay, remuneration system.
- Ensure the status & security of jobs.
- Maintain safe working conditions.

EMPLOYER ORGANISATIONS

- Definition. Wholly or mainly of proprietors whose principal purposes include the regulation of relationships between employers workers & T.U.'s
- Responsibilities.
  - promote members interests.
  - maintain arrangements for settling disputes.
  - 'police' & enforce agreements & procedures.
  - collect & analyse info^ about industrial relationships.
  - offer advisory services.

RECENT EMPLOYMENT LEGISLATION

- Health & Safety legislation
- Redundancy legislation - including dismissals & grievance procedures.
- Discrimination legislation - sex, race, nationality, religion.
- Employee welfare - wages & benefits; women's rights; young & handicapped persons.

See films :-
Managing Industrial Relations
Communications in Industry

COMPLAINTS & GRIEVANCES

* How do they differ ?
* Conducting an interview
* Grievance procedures.
* Why use procedures.?

COMPLAINTS & GRIEVANCES

- Complaint - one possible expression of a grievance.
- Grievance - the result of unfulfilled expectations.

COMPLAINTS often precede grievances e.g.

- being given duties below what your capabilities or qualifications might suggest.
- different 'cultural' practices of an immigrant worker.

GRIEVANCES exist in the gap between expectations & reality. They may be manifest in :-

- Industrial unrest.
- Reduced output.
- Increased accidents, vandalism & wastage.
- Poor quality work.
- Discipline problems.

or externally by :-

- Customer dissatisfaction

CONDUCTING AN INTERVIEW

- **WHEN** ? As soon as possible after symptoms revealed. While not under pressure. While you may be undisturbed.
- **WHERE** ? Choose common ground.
- **HOW** ? Informally at first - sound out & diagnose. Use open Q's.
- **LISTEN**

LISTEN

- Show interest in the incident.
- Use 'attending' behaviours
- Don't argue.
- Don't promise anything.
- Summarise.
- Follow up with action.

ATTENDING BEHAVIOURS

- Attitude / posture,
- Use non-verbal prompts,
- Paraphrase to ensure understanding,
- Maintain eye contact,

etc.

GRIEVANCE PROCEDURES

- Consult & use procedures if they have been formulated.
- Use personnel officers as mediators.
- Complainer goes to immediate superior.
- Only use union representative
- Allow time between moves for consultation, etc.

UNION REP.

- For advice initially.
- For representation later.
- Where there are several complainers.

WHY USE PROCEDURES ?

- Minor complaints may be dealt with quickly & without effort.
- Senior management not inundated with minor complaints with routine solutions.
- Supervisor will benefit
- Unions have a chance to agree procedures.
- Unions need the discipline within their own membership.
- Can become a part of the conditions of service.

SUPERVISOR BENEFITS

- Learns - by handling complaints.
- Retains authority if not by-passed.
- Ensures he is aware of what is going on.
- Aids delegation, builds responsibility.

MAINTAINING DISCIPLINE & MORALE

* What are discipline & morale ?
* What is good discipline?
* Why do discipline problems arise?
* Rules & discipline procedures.

DEFINITIONS

- Discipline
- Morale

DISCIPLINE is the creation of a system in which people will willingly sacrifice their own :-
- immediate good
- personal wishes
- comfort
- convenience

for the sake of the team, for
- its well being
- its success
- meeting its goals
- obeying its rules.

MORALE is the spirit & relationships within the group.
Good morale is shown by
- enthusiasm.
- harmonious & cohesive relationships.
- a high priority on group needs & hence more discipline

HOW TO RECOGNISE GOOD DISCIPLINE

- Good discipline is shown by :-
  - The appearance of the people & the premises.
  - The example of the supervisors & of mgt.
  - The conduct of the staff.
  - The flow of work.
    - good quality.
    - good quantity.
    - low waste levels.
  - punctual.
  - attendance good.
  - observing safety regulations.
  - low accident rates.
  - appropriately tidy.
  - using safety equipment.
  - self disciplined.
  - observing rules.

SOURCE OF PROBLEMS

- Insufficient / inadequate supervisory authority.
- Counterproductive incentives.
- Poor management example
- Silly rules.
- Rules poorly explained.
- Weak management.
- Not enough work.
- Unsuitable staff.
- Low morale.
- Poor hygiene factors.

RULES & DISCIPLINE PROCEDURES

- Rules
- Discipline procedures

Rules should be :-
- clearly stated.
- fair.
- reasonable.
- subject to revision.
- explained to all.

Procedures should be :-
- in writing.
- specify to whom they apply.
- provide for quick action.
- indicate situations & sanctions.
- permit representation
- permit balanced investigation to establish facts.
- have right of appeal.

GET THE FACTS

- What deviation has occured ?
- Check for patterns of behaviour.
- Check records of performance.
- Talk to the person.

..... THEN ACT (IF NECESSARY)

- Pick the best time & place.
- Don't arouse resentment.
- Consider the person.
- Don't harbour grudges.
- Know the limitations of your authority.

INTERDEPARTMENTAL CONFLICT

* THE EFFECTS OF CONFLICT.
* THE RESULTS OF RESOLVED CONFLICT.
* WAYS OF REDUCING CONFLICT.

THE EFFECT OF CONFLICT
- Inside groups
- Between groups

INSIDE GROUPS
- Sees best in itself & worst in others.
- More task oriented. Demands conformity.
- Greater loyalty & territorial interest.

BETWEEN GROUPS
- Interaction & comm^{n} decreases.
- Hostility increases.
- Stereotypes formed of hostile group.
- Emphasis on strategy over objective problem solving.

THE RESULT OF RESOLVED CONFLICT
- The winners.
- The losers.

THE WINNERS
- More cohesive.
- Become complacent.
- Less tension.
- More play & less work.
- More cooperation within the group.

THE LOSERS
- Group splinters, fights internally, & reorganises.
- More tension.
- Leaders blamed.
- If future wins seem impossible they blame themselves & become depressed.

The group is in a position where it can learn a lot about itself.

WAYS OF REDUCING CONFLICT
- Find an overriding goal.
- Carry out group maintenance.
- Avoid WIN:LOSE situations.
- Rotate group members.

OVERRIDING GOAL
- Make groups aware of common goals.
- Make group aware of common threats.
- Increase commitment to common goals.

ROTATE GROUP MEMBERS
- Temporary transfers.
- Regular transfers.

INTERGROUP MAINTENANCE
- Increase encounters socially & at work.
- Examine assumptions about the other group.

AVOID WIN:LOSE SITUATIONS
- Avoid situations where individuals lose face.
- Avoid intergroup appraisal & competition.

PAPERS :-
A 598 - Intergroup behaviour.
A 623 - Dealing with differences.
A 754 - Dealing with conflict.

FILMS :-
"Blowing Hot & Cold."
"The one-sided triangle"

THE ANATOMY OF CONFLICT

* What is conflict ?
* Types of conflict.
* A general process.
* National character.
* The human character.

CONFLICT : is the result of clashes between seemingly incompatible principles or standards.

WHAT PRINCIPLES / STANDARDS?
- differing moral standards,
- differing economic standards.

Defined by whom?
Are definitions relevant?

NOT - for the 'victims'.
NOT - for the 'participants' if they are :-
- already convinced,
- minds are closed,
- attitudes adopted,
- postures taken.

TYPES OF CONFLICT
- Healthy conflict.
- Unhealthy conflict.
- Latent conflict.

Confrontation or the challenge to the 'status quo' can lead to growth and healthy development.

A situation exists which can gradually & imperceptibly lead to ACTUAL conflict.

A problem of judgement.
- one party sees themselves disadvantaged in someway.
- a second party disagrees.
- conflict ensues.

Is the existing (pre-conflict) state more desirable than the later (post-conflict) state? Is the 'improvement' worth the human 'cost' ?

A GENERAL PROCESS

- Grievance :- perceived differences or unfair treatment (real or imagined).
- Freedom to associate, communicate & act :- difficult to supress ; easy to compare.
- Hope of solution :- an ideal or aim which would satisfy the leadership.
- Sufficient result to feed the group :- and allow it to become self supporting.
- Ignition :- any incident which can be turned to account.
- Publicity for cause and leader :- may persue private aims (eg. power). People feed on the publicity they get & are urged to 'go one better.'

- Inflammation of a 'critical mass' :- Support from the 'in-group' from those who want to identify but dare not.
- No way out :- better forward than back.
- Polarization :- easy (over-easy) identification of enemy/friend. Colour or sibboleth helps. Closing of ranks. Conversion of doubters.

THE HUMAN CHARACTER
- Conflict is endemic & visible in human activities, eg.
  - the struggle to survive in life & society. (see Maslow)
  - sensitivity to 'injustice' leading to industrial conflict.

NATIONAL CHARACTERISTICS
- Some nations have a :-
  - History of freedom (or oppression) → Colonialists c.f. colonised
  - History of tolerance (or lack of) → British c.f. Latins
  - Long memory for grievances. → Celts & Jews

Issue 2

6.27

DISCUSSION PAPER ON CONFLICT

"The best way to stay scared is to keep yourself from finding out exactly what you are scared of". Herman & Korenich.

ASK YOURSELVES

Who gets into 'conflict' ?

What do I do when I feel a state of 'conflict' ?

What are the consequences of 'conflict' ?

What are some sources of 'conflict' ?

'Conflict' is often avoided:

- why ?
- is avoidance better than confrontation ?

CAN YOU VIEW CONFLICT AS:

- natural between individuals and organisations ?
- an opportunity for energising change and creativity ?
- difficult to bury, yet cannot be legislated for ?
- a source of vague, general predictions of catastrophe and discomfort ?
- not best dealt with by pushing people into confrontation ?

UNRESOLVED 'CONFLICT' - CAN YOU ACCEPT THAT:

- an 'unhappy ending' can be legitimate
- you can agree to :
  - send it 'upwards'
  - agree to disagree (which often dissolves the issues)

FEATURES OF CONFLICT

CONSULTANT FOCUS

- be aware of your own comfort/ discomfort and catastrophic fantasy
- those observing are usually more fearful than those in 'conflict'

WHEN DEALING

- we state needs
- we go from impersonal to the personal
- we go from abstracts to specifics, to concrete
- we might suspend caution, caricature the extreme positions
- we should encourage and use humour, lightness, free expression.

READINESS TO DEAL CAN YOU DECIDE:

- when are the conflicting parties ready to deal ?
- what is, the worst that could happen ? the best that could happen ?

COMMUNICATIONS

- communication should be maintained
- semantics, is often the cause of some but not all differences.

THE CONSULTANCY ASSIGNMENT

* Phases in the assignment
* The behaviour of the consultant.
* The effect of the consultant
* The roles of the consultant

PHASES IN THE ASSIGNMENT

- Entry
- Contracting
- Data collection & diagnosis
- Feedback
- Decision taking
- Implementation

Each phase has a requirement which has to be met before moving on.

ENTRY
- Generating a lead.
- Getting new business.

CONTRACTING
- Building a social contract.
- Easier at beginning of assignment.

CONTRACTING
- Gaining „commitment
- Creating "client responsibility"
- Negotiating wants
- Removing fears
- Identifying the client

COMMITMENT
- Without commitment emotional blocks will hinder the change. (see Implementation)

RESPONSIBILITY
- Try to get 50:50 responsibility for solving the problem.

WANTS
- What is problem?
- What does client want to be changed?
- What does he want from me?
  - technical help.
  - personal help
- What might he want?
  - what is essential?
  - what is desirable?
- What do I want?
  - support & feedback
  - data
  - offices & facilities

THE CLIENT
- Who is he?
- Who inputs energy & power?
- Who am I contracted with?

FEARS
- Fear of loss of face dependant on outside expert.
- Fear of loss of control – in a political system....

... so

- Help him to talk about his fears so he takes responsibility for them.
  - get him to express reservations.
  - to say why help is needed.
  - to say how the project might make him vulnerable.
- Don't take it personally!

CONSULTANT BEHAVIOUR

- He must behave authentically.
- He must treat the client as an equal/peer.
- He must make client aware of what is happening. Clients hate to be surprised.
- He is a "role model" & client knows if he is acting honestly.

Consultant must know:
- how his client feels.
- what his client wants.

These feelings & needs are affected as much by political factors such as power, influence, authority & need for control, as by the requirement to produce or provide a service.

EFFECT OF CONSULTANT

- Increase productivity
- Remove dependancy
- Increase enjoyment

ROLES OF CONSULTANT

- Expert
- Pair of hands
- Facilitator

(see S.180b)

IMPLEMENTATION
- Change process is both rational & emotional.
- Desire for control can be greater than that for increased performance.

DECISION TAKING
- Dealing with client defensiveness & resistance – focus on here & now.
- Dealing with own defensiveness – don't take it personally.
- Dealing with lack of direct power.

FEEDBACK
- Planning how much data to give:
  - people can only deal with 2 or 3 items at once.
  - consider personal concern/political anxiety.
  - how much data on how the problem is being managed.

DATA COLLECTION & DIAGNOSIS
- Finding out what is happening.
  - present problem.
  - the politics of the situation leading to anxiety.
- Complete data is never available.
- People are never totally objective. Even the consultant. Even an interview is active intervention.

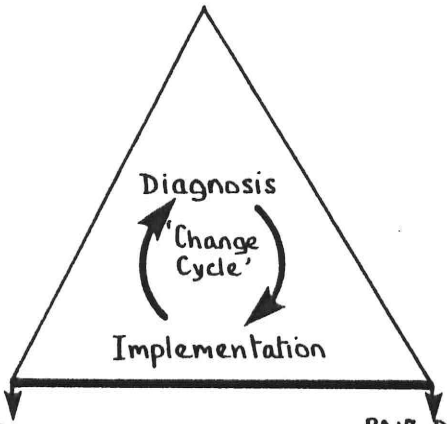
INCREASING ENJOYMENT
- Removing the association of PAIN with work, change & learning.
- Increase openness.

REMOVING DEPENDANCY
- Learning to do it themselves.
- Being prepared to do it themselves – the expertise is normally there.

INCREASING PRODUCTIVITY
- Increase performance.
- Increase effectiveness.

CONSULTANCY DEVELOPMENT

(THE ROLES OF A CONSULTANT)



FACILITATOR

Assisting the client to implement change.

- The human side of the change process.
  - Behavioural knowledge,
  - Self knowledge,
  - Interpersonal skills.
- The task side of the change process.
  - Planning techniques
    - networks, bar-charts, etc.
  - Data collection techniques
    - statistical techniques,
    - charting, etc.
  - Forecasting techniques
    - statistical techniques,
    - force field techniques.

EXPERT

- Providing specialist knowledge not possessed by the client.

PAIR OF HANDS

- Assisting at a time of client overload

CHANGE CYCLE

- Diagnosis - the ability to understand the client's problem. Requires:
  - Effective thinking,
  - Problem analysis & decision making.
- Implementation - the ability to help the client. Requires:
  - Effective communication
    - interviewing,
    - speaking,
    - writing,
    - training.
  - Major intervention
    - project management,
    - organisation structure,
    - O. & M. procedures.

PAPERS:-

A6 - The role & practice of management consultancy.
A100 - The role of the internal consultant.
A446 - Helping & consulting.
A533 - The approach to a consulting assignment.

Issue 2

STAGES in a CONSULTING ASSIGNMENT

* SURVEY & AGREE INVESTIGATION
* COLLECT & RECORD THE FACTS
* DESIGN THE SYSTEM
* AGREE & INSTALL THE NEW SYSTEM
* CHECK THE RESULTS

SURVEY & AGREE INVESTIGATION

- Define objectives
  - outline possible solutions,
  - assess feasibility.
- Project programme
  - assess consultancy load,
  - assess management requirements.
- Establish working relations
  - involve management,
  - establish credibility,
  - establish acceptability with staff.
- Establish likely costs
  - let management evaluate
    - financial costs
    - likely disruptions.

PROJECT OBJECTIVES

- How was the problem recognised?
- What type of project is it?
- What are the aims &/or objectives?

TYPES OF PROJECT	OBJECTIVES
EXPANSION	Broaden scope. Increase turnover. Use other resources. Reduce dependency.
REPLACEMENT	Reduce downtime. Increase throughput. Reduce manning. Reduce dependency. Speed up.
Increased EFFICIENCY	Reduce costs of - People. - Services. - Scrap. Speed up. Greater accuracy.

CHECK THE RESULTS

- Are AIMS being achieved?
  - modify system if necessary,
  - learn for future projects.
- Now get out!

COLLECT THE FACTS

- Collect information from:-
  - interviews, questionnaires,
  - records.
- Know & understand:-
  - the POLITICS,
  - methods & skills used,
  - attitudes to change.
- Record information so it is:-
  - easily recorded,
  - readily checked,
  - readily assimilated.

ESTABLISH WORKING RELATIONSHIPS

- Gain commitment.
- Create client responsibility.
- Negotiate wants..... theirs & yours.
- Remove fears.
- Identify the client.

WHAT ARE THE AIMS/OBJECTIVES?

- How does this project:-
  - fit in with corporate aims?
  - justify its use of resources.
  - improve the organisation's prospects

IDENTIFY AIMS/OBJECTIVES

- Identify aims carefully.
- Do aims really justify.....
  - their costs,
  - the disruption caused.
- Is this the best way to spend the money?
- How does this work balance with other work?

DESIGN THE SYSTEM

- Involve the client so that:-
  - their ideas are incorporated,
  - they are happy about implications,
  - they feel the investment justified.
- Make it practical & professional.
  - consider staff wants & limitations.
  - consider the project objectives.

BEING PROFESSIONAL

- Be open-minded.
- Avoid prejudice.
- Be methodical & thorough.
- Be honest & authentic.
- Be unbiased by politics & tradition.
- Be realistic.

AGREE & INSTALL THE NEW SYSTEM

- Consider people
  - informing; training; recruiting.
- Consider things
  - hardware & software,
  - design; manufacture; purchase.
- Consider time
  - schedule resources,
  - consider other commitments.
  - monitor progress.
- Consider possible problems
  - avoid (if possible).
  - be prepared - if not!

CONSIDER PEOPLE

- Consult.
- Persuade.
- Design for people.

CONSULT

- Seek help & encourage suggestions.

PERSUADE

- Be considerate (avoid arrogance & flippancy).
- Consider their attitude to change.
- Inform on progress.
- Sell ideas, don't tell.

CONSIDER TIME

- Estimate time - be realistic for political reasons.
- Don't use overtime if avoidable.
- Provide checkpoints.
  - Job diary; bar charts; computer control.

DESIGN FOR PEOPLE

- Not too sophisticated.
- Not too childish.

PAPERS:- A.204 - 0.8 H. Project Mgt. Issue 2

CONSULTANCY ASSIGNMENT - SURVEYING

* WHY SURVEY ?
* WHEN TO SURVEY ?
* HOW TO SURVEY ?

WHY SURVEY ?
- To help CLIENT by showing :-
  - whether they should take action.
  - how they should take action.
  - who should take action.
- To help CONSULTANT to :-
  - learn about the problems.
  - consider how to tackle the problems.
  - plan the resources needed.
  - introduce him/herself & sell the assignment.

WHEN TO SURVEY ?
- Separate from the assignment, to allow time for :-
  - acceptance of consultants,
  - acceptance of recommendations,
  - resource planning & allocation.
- At beginning of the assignment :-
  - to reduce delay,
  - to involve consultant more fully.

HOW TO SURVEY ?
- Pre-survey meeting
- Survey preparation
- Information collection
- Survey proposal

PRE-SURVEY MEETING
- Definition of problem/Terms of reference/ Identify attitudes.
- Required benefits for decision makers.
- Sources of information & outline programme. Professional contact.
- Announcement & introduction of consultants.
- Consultant's working accommodation & administration contact.

SURVEY PROPOSAL
- Report
  - Define problem.
  - Findings (cause & effect).
  - Aims of assignment.
  - Possible approaches - recommended action.
  - Resources required.
  - Costs.
  - Benefits.
  - Competence/track record.
- Presentation
  - Selling the benefits.
  - Showing competence.
  - Communicating.

SURVEY PREPARATION
- Identify previous work.
- Agree team organisation.
- Allocate areas of responsibility.
- Agree programme of work & progress points.

PROGRAMME
- Who to see ?
- How to collect information
  - Unstructured interview.
  - Structured interview.
  - Group interview.
  - Questionnaires.
- How much time
  - ½ day / interview.?
  - contingencies.

INFORMATION COLLECTION
- Identify problem.
- Identify causes.
- Decide on aims.
- Identify courses of action.
- Select most appropriate course

ESTIMATE TIME & RESOURCES
- Skills & knowledge needed.
- Consultant time & contingencies.
- Costs; including computing, travel, printing, etc.

PAPERS :-
A 157 - Surveying
A 275 - Surveys. Preparation & Information Collection.
A 394 - Survey & Feedback

ISSUE 2

CONSULTANCY ASSIGNMENT (PLANNING, DOING & CONTROLLING)

* Measure of a successful assignment
* Supervision &/or support
* Planning & control
* Doing

SUCCESSFUL ASSIGNMENT
- Improvement in client performance.
- Happy client.
- Assignment completed within time & costs.
- Feeling of achievement by consultant.

SUPPORT FROM COLLEAGUE
- Additional info^{n}. - from experience
- Second opinion.
- Devil's advocate.
- Brainstorming partner.
- Moral support.

SUPPORT FROM CLIENT'S STAFF
- Involves client's staff.
- Helps consultant.

ASSIGNMENT PLANNING & CONTROL
- To coordinate client & consultant's effort.
- To allocate resources.
- To control time.
- To justify delay or overrun.

DOING
- Sources of info^{n}.
- Reports & job records.
- Security & Info^{n} storage.
- Relationships & involvement.
- Personal behaviour.

PERSONAL BEHAVIOUR
- Avoid giving offence by:
  - personal appearance,
  - dogmatic or over-assertive manner,
  - unpunctuality.

RELATIONSHIPS & INVOLVEMENT
- Attention must be given to building good working relationships.
  - Consultant may seem threatening,
  - Should be seen as useful collaborator,
  - Must gain respect.
- Consultant must have a degree of emotional involvement - enough to be motivated & concerned. Independent enough to avoid political & psychological forces.
- Consultant must work effectively with Unions;
  - He cannot bargain without management.
  - He must keep mgt. fully briefed.
  - He can build bridges between unions & management by informal contact.

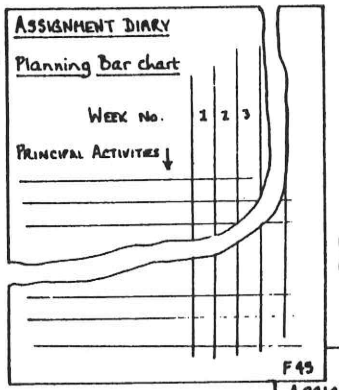
SOURCES OF INFO^{n}.
- Terms of reference / survey reports.
- Past reports &/or working papers. (Same or similar client.)
- Published info^{n}. - client or industry.
  - annual reports.
  - press cuttings, industrial profiles.
  - 'Moodie' cards.
- Organisation chart & telephone numbers.

REPORTS & JOB CARDS
- Monthly progress report - if requested -
  - useful discipline & assignment review.
  - useful record of progress.
- Job records -
  - a store of experience of client or similar organisation.

SECURITY / INFORMATION STORAGE
- Care must be taken with sensitive material.
- Papers must be :-
  - quickly stowed & easily transported,
  - easily retrievable,
  - safe from loss & wrong hands.
- Suggest
  - lockable case,
  - concertina files.

ASSIGNMENT DIARY

Planning Bar chart



F 45

PAPERS:-
A 165 - The assignment. Planning, Doing & Controlling
F 44, 45, Assignment Diaries

Use network logic on complex jobs.

ASSIGNMENT DIARY W/B

Working Plan & Achievement

Day	Work Planned	Act^{y}	Work Done
M			
Tu			
W			
F			

General Notes

F 44

ISSUE 2

TRAINING

* What is training ?
* How to train
* Why train ?
* Motivation to learn

WHAT TRAINING ?

- Skills training
- Staff development

SKILLS TRAINING

- Designed to increase people's immediate effectiveness by:-
  - improving their manual skills &/or
  - improving their clerical skills

MANUAL SKILLS

- The dev't of reflexes - ability to work with tools & machinery.

CLERICAL SKILLS

- Memorising & learning procedures.

STAFF DEVELOPMENT

- Designed to improve people's overall long-term effectiveness by:-
  - improving higher mental skills &/or
  - changing their attitudes

HIGHER MENTAL SKILLS

- Comprehending concepts.
- Problem solving skills.
- Communication skills - -listening, observing, persuading.
- Being creative.

CHANGING ATTITUDES

- Attitudes involved with
  - taking the initiative,
  - being open to change
  - being resourceful,
  - being creative,
  - being motivated to use ideas,
  - creating confidence.

MOTIVATION

- People only learn if they have a problem to solve & will only apply the solution if it is their solution to their problem.
- The trainer's role is to create an atmosphere where people feel :-
  - safe to question their attitudes,
  - motivated to see their problems,
  - able to get ideas to solve their problems from trainers and colleagues.
- People will only apply their ideas after a course if :-
  - they plan them on the course,
  - they don't try to apply too many too quickly,
  - their organisation will let them.

WHY TRAIN ?

- We train people to change their skills, knowledge, & attitudes so that they change their ways of doing things.

HOW TO TRAIN

- Depends upon
  - Who to train
  - What sort of training

WHO TO TRAIN

- Different methods depending upon their requirements viz. expectations ; abilities ; experience; or intellectual needs.
- Consider requirements eg induction courses ; apprentice, operator, supervisory or mgt. training.

WHAT SORT OF TRAINING ?

- Manual skills & reflex dev't.
- Clerical skills & learning procedures.
- Higher mental skills
- Changing attitudes

ATTITUDE FORMATION

- To change peoples' attitudes & motivate them to use new techniques use :-

DISCOVERY METHOD. Trainees find out for themselves from a series of problems getting harder.
CASE STUDIES. Analysis of a documented problem (alone or in groups)
SEMINARS. Structured discussions, leading through the main points.
ROLE PLAYS. Learning by experience in live situations.
PROJECT WORK / COACHING. 'Learning by doing' in a real job with input from your boss or an expert.

CLERICAL SKILLS

- Memorising & learning procedures. Use :-

CHECKLISTS,
MNONICS,
ALGORITHMS,
RULES,
PROGRAMMED LEARNING.

HIGHER MENTAL SKILLS

- Comprehending concepts & using planning skills. Use :-

INFOⁿ. PRESENTATION & FEEDBACK
Trainee absorbs from lecture, books, films, papers or tapes. Trainee discusses with trainer. Trainer broadens information.
DISCOVERY METHOD.
PROGRAMMED LEARNING. Trainee follows programmed questions & checks answers. Remedial 'loops' correct wrong answers.

MANUAL SKILLS

- Train by instruction & practice, using :-

INSTRUCTION Oral, written & observation modes
PRACTICE Learn by doing - bit by bit, slow down, & finally piecing together the whole job.

∝ Issue 2

RUNNING A TRAINING SECTION

* Review the basic OBJECTIVES of the ORGANISATION
* What must be done to achieve these objectives?

BASIC OBJECTIVES

The organisation exists for ONE or MORE of the following reasons :-

- obligation to the OWNERS,
- obligation to EMPLOYEES,
- obligation to COMMUNITY.

The section may have a further objective

- to maintain an individuality.

To OWNERS

- Profit
- Growth of assets
- Personal fame or honour.

To EMPLOYEES

- Employment & Pay
- Development
- Interest
- Security
- Personal fame or honour

To COMMUNITY

- Improve available abilities.
- Provide personal dev't.
- Earn money.
- Provide employment.
- Gain reputation.

MAINTAIN AN INDIVIDUALITY

To provide :-

- highest quality training.
- local training expertise.

HOW TO ACHIEVE THESE OBJECTIVES

- Staff PLANNING and DEVELOPMENT
- Providing facilities.
- Providing information.
- Providing the training service.

PROVIDING TRAINING

- Designing courses.
- Organising outside lecture input.
- Lecturing on & administ^{g} courses.
- Follow-up & redesign of Courses.

PROVIDING INFORMATION

- Training papers, exercises & games.
- New info^{n} into system.
- Sharing info^{n}
- Servicing & maintaining info^{n}.
- Providing info^{n} to clients.

PROVIDING FACILITIES

- Accommodation :- teaching, feeding, sleeping, recreation, admin^{n}
- Equipment :- teaching, household, recreat^{n}.

STAFF PLANNING & DEVELOPMENT

- Staff planning.
- Staff recruitment.
- Staff appraisal.
- Staff development.

STAFF PLANNING

- How many staff
- What grades
- What abilities

Consider leaving

- planned leaving
- unplanned leaving

Consider learning period

STAFF DEVELOPMENT

What methods ?

- on courses
  - in-organisation
  - outside
- by experience
  - in-job
  - in new job
  - outside
- by coaching
- by counselling

STAFF APPRAISAL

- How am I doing ?
- Where do I want to go to ?
- Where do you want me ?
- How do I get there ?
  - training
  - experience

STAFF RECRUITMENT

- Permanent recruitment or secondment.
- How to get the people
- Where to get them from
  - own organ^{n}
  - other organ^{n}.

TRAINING NEEDS & WAYS OF MEETING THEM

* WHAT TRAINING & DEVELOPMENT NEEDS DO YOUR STAFF HAVE ?
* WHAT CAN YOU DO TO MEET THEM ?

MEETING THE NEEDS
- Preparation.
- Training at work.
- Courses & training in groups.
- Private study.

TRAINING & DEV'T NEEDS
- Changing attitudes.
- Improving technical skills & knowledge.
- Education.

- Comprehending concepts;
- Memorising.

CHANGING ATTITUDES
- Attitude when working with others eg. listening; enthusing; disciplining; discussing & solving problems; getting things done.
- Attitude when managing yourself eg. managing time; accepting risk; creating ideas; getting things done.

TECH'L SKILLS & KNOWLEDGE
(a) Understanding concepts.
(b) Memorising.
(c) Using skills.
(d) Learning procedures.
(e) Reflex development.

PREPARING TO MEET THE NEEDS.
- Appraisal & needs analysis.
- Counselling.

APPRAISAL & NEEDS ANALYSIS
- For the boss (& company) :-
  - HOW can they improve ?
  - How can they be helped ?
  - Are they happy with their job & prospects ?
- For the subordinates :-
  - HOW can they improve ?
  - WHERE can they get help ?
  - WHERE are they going (prospects)?
  - Is the boss happy with their progress ?

COUNSELLING
- Getting a person to understand :-
  - how they contribute to a problem.
  - how they can help solve the problem.

PAPERS :-
A.643 - APPRAISAL INTERVIEW
A.383 - FEEDBACK
A.580 - METHODS OF TRAINING
A.672 & 361 - COUNSELLING
A.609 - COACHING
A.1103 - DELEGATION

DELEGATION
Giving subordinates the freedom & authority to handle certain matters on their own INITIATIVE, CONFIDENT they can do the job successfully.

COACHING
Dev't at work turning problems into LEARNING SITUATIONS in a PLANNED WAY under GUIDANCE.

ACTION LEARNING
Provide conditions for a manager to :-
- recognise any attitude problems.
- UNFREEZE & change attitudes.

COURSES based on :-
- lectures; programmed learning; discovery learning; T-groups;

READING
- Books; journals; magazines;
- planned reading.

CORR'CE COURSES
- In technical subjects.
- for qualifications.

AUDIO-VISUAL MODULES
- Audio tapes
- Tape/slides
- C.C.T.V & films

	(a) Comprehending Concepts	(b) Memorising	(c) Using skills	(d) Learning Procedures	(e) Developing Reflexes	Changing Attitudes
TRAINING AT WORK: Delegation & Coaching	A	B	A	B	A	A
TRAINING AT WORK: Action Learning	B	-	-	-	-	A
COURSES & TRAINING IN GROUPS: Management Courses	B	B	B	-	-	B
COURSES & TRAINING IN GROUPS: Self-management Courses	B	B	B	-	-	B
COURSES & TRAINING IN GROUPS: Technical lectures & Courses	B	B	B	B	-	-
COURSES & TRAINING IN GROUPS: Team-building Courses	-	-	-	-	-	B
COURSES & TRAINING IN GROUPS: Group Discussion	B	-	B	-	-	B
COURSES & TRAINING IN GROUPS: Skill Training Courses	-	B	B	B	B	-
PRIVATE STUDY: Reading	B	B	C	B	-	C
PRIVATE STUDY: Correspondence Courses	B	B	-	-	-	-
PRIVATE STUDY: Audio-visual Modules	C	B	B	B	-	-
PRIVATE STUDY: Discussion (formal/informal)	A	-	-	-	-	B

A = Excellent B = Good C = Poor

COURSE PREPARATION

* WHAT ARE THE AIMS OF THE COURSE ?
* WHAT LIMITATIONS ARE THERE ?
* WHAT PROGRAMME WOULD BE BEST ?
* WHAT DETAILED PROGRAMME WILL BE USED ?
* SESSION PREPARATION

AIMS of the COURSE

- What results do I expect ?
- What changes does the client want ?
- How will they apply it ?
- How to monitor progress & success ?

AIMS of the COURSE

- Attitude change.
- Comprehension of concepts.
- Learning of procedures.
- Memorising.
- Using skills & techniques.
- Reflex development.

LIMITING FACTORS

- Time available
- Knowledge of the class
- Potential of the group
- Number in the group.
- Previous experience

TIME AVAILABLE

- How much time overall.
- How much time at once.
- Consider - ability to concentrate, effect on work.

KNOWLEDGE of the CLASS

- What do they know ?
- What cultural problems ?

POTENTIAL of the GROUP

- How fast can I go ?
- How far can I go ?
- Consider culture
- Consider - their prep^n., their expectations.

NUMBER in the GROUP

- Different group sizes need different training methods.
- Small gp. = individual attention
- Medium gp. = ideas from group
- Large gp. = preaching

PREVIOUS EXPERIENCE

- Previous experience of training (good or bad) affects their reaction to your course.
- Consider the effect of group pressure on participants during the course.

SESSION PREPARATION

- Agree objectives
- Prepare handouts.
- Plan session :-
  - lesson plan,
  - summary paper,
  - slides (ohp ; 35mm),
  - exercises & case studies,
  - films,
  - exhibits, etc.
  - reading lists.
- Organise typing.
- Order films.
- Prepare visuals.
- Discuss with the course director :-
  - link up with other sessions,
  - avoid duplication.

THE DETAILED PROGRAMME

- Preparing the course members
- Scheduling the sessions
- Planning the follow-up

PLANNING FOLLOW-UP

- Course members' own action plans.
- Follow-up discussions with :-
  - course members,
  - training managers,
  - line management.
- Improving course (future) & image of the trg. organ^n.

SCHEDULING SESSIONS

- Setting objectives.
- Planning content.
- Decide on methods.
- Allocating time. (What time's within the day)
- Select instructors.

PREPARING THE COURSE MEMBERS

- What do they want from the course?
- What do they expect of the course?
- What/how should they prepare before the course?

JOINING INSTRUCTIONS :-

- Identify the course objectives.
- Set tasks eg. analyse time usage ; identify problems.

BEST OVERALL PROGRAMME

- How will this group learn best ?
- What methods are available ?
  - learning from TEACHING
  - learning from 'SEEING'
  - learning by 'DISCUSSION'
  - learning by 'DOING'
- May a combination of these be used ?

LEARN BY DOING

Role play ; games ; T-groups ; discovery method ; project work ; assignments ; coaching ; individual tasks ; delegation ; skills practice ; coverdale trg.

LEARN BY DISCUSSION

Seminars ; tutorials ; case studies ; brainstorming ; syndicate work ; group discussions.

LEARN BY SEEING

Visits to sites, factories, etc.
Demonstrations

LEARN FROM TEACHING

Lecturing ; Reading ; Correspondence courses ; programmed learning ; A-V modules ; Computer aided learning.

COURSE PREPARATION (PERSONAL WANTS)

- What do you want from the course ?
- How do you achieve your objectives ?
- How do you monitor your progress ?

COURSE OBJECTIVES

- WHAT do You want from the course ?
  - * discuss with your boss.
  - * quantify where possible.
- How can You apply what you hope to learn ?
- How can You monitor YOUR progress ?

ACHIEVING THE OBJECTIVES

- What does the course (brochure) plan to achieve ?
- What does the organiser hope to achieve ?
  - * discuss the course content. — before
  - * discuss personal objectives. — before
- What is the ORGANISER achieving ?
  - * discuss plans & "objectives". — before
  - * discuss achievement. — after

MONITORING PROGRESS

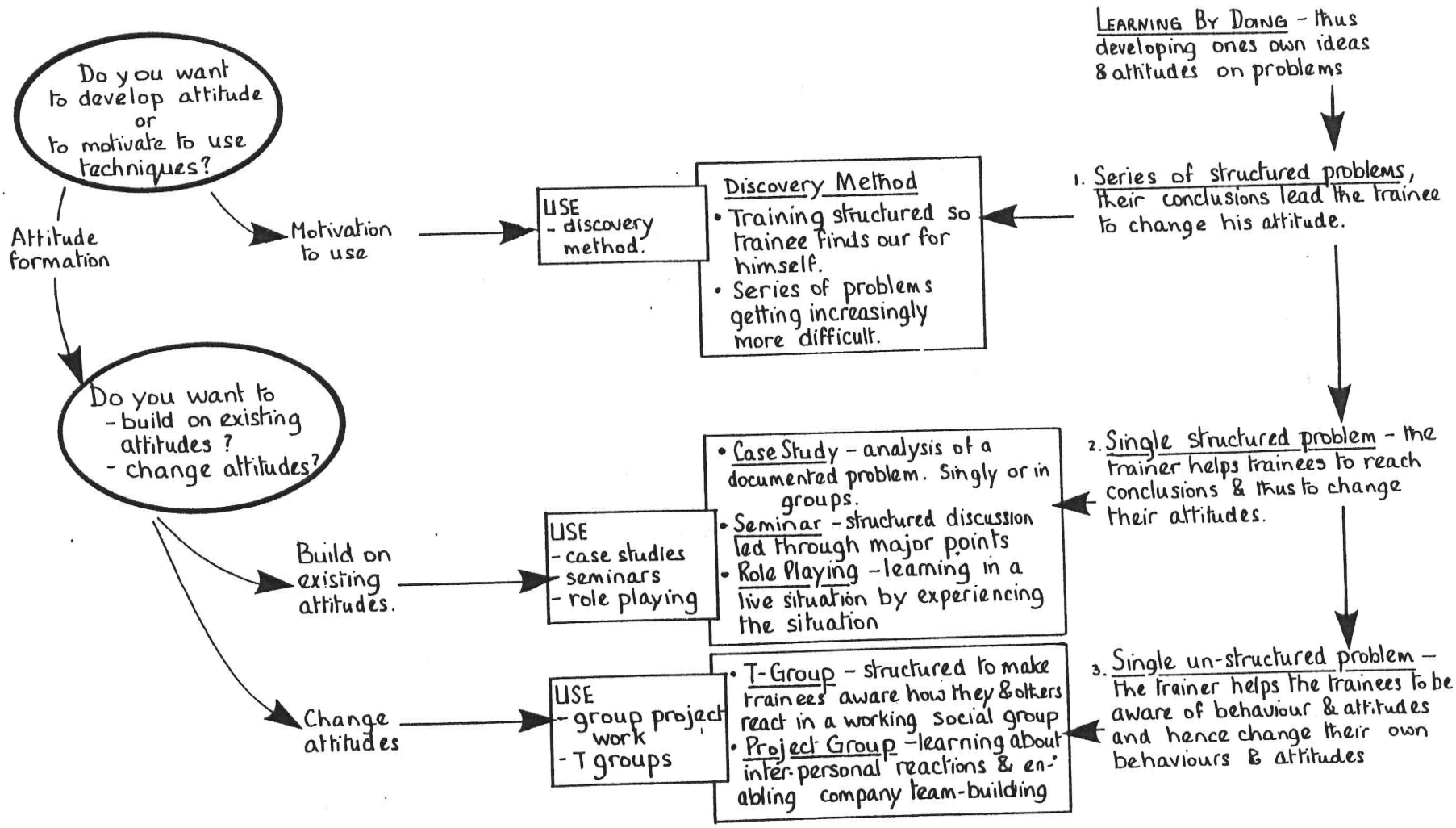
- Check learning v. objectives of the course.
  - * can you catalogue NOTES with OBJECTIVES ?
  - * can you APPLY what you have learnt ?
- Check achievement v. objectives
  - * write down what you want to achieve after the course.
  - * have you ACHIEVED it ?
- Discuss your learning with your boss & seek ways to apply it.

FEEDBACK

- Helps the lecturer/tutor to make the course successful.
- Helps You to avoid frustration

TRAINING DESIGN ALGORITHM

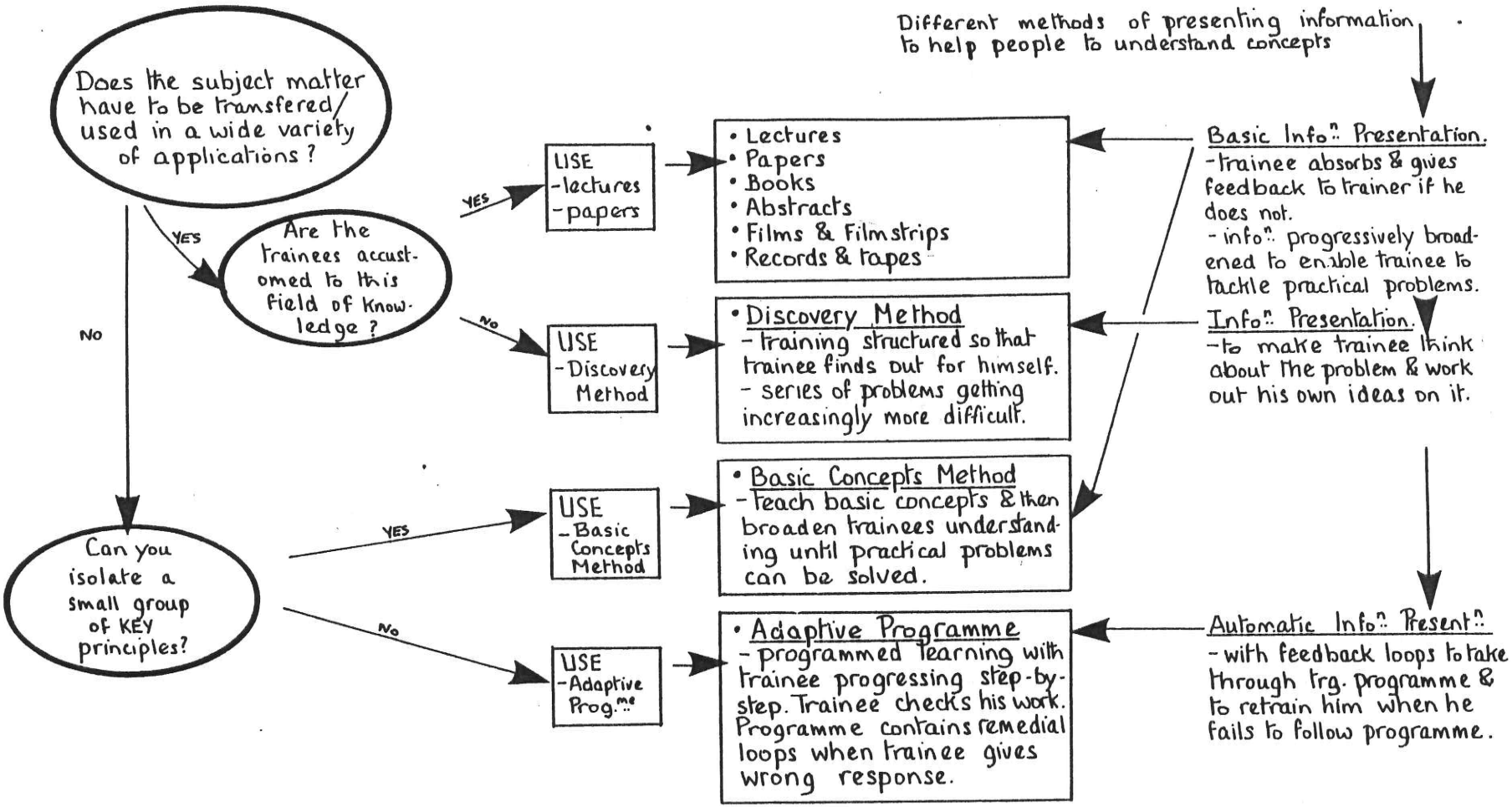
DEALING WITH PEOPLE (Attitude Formation)



Paper : A 580 Training Design Algorithm

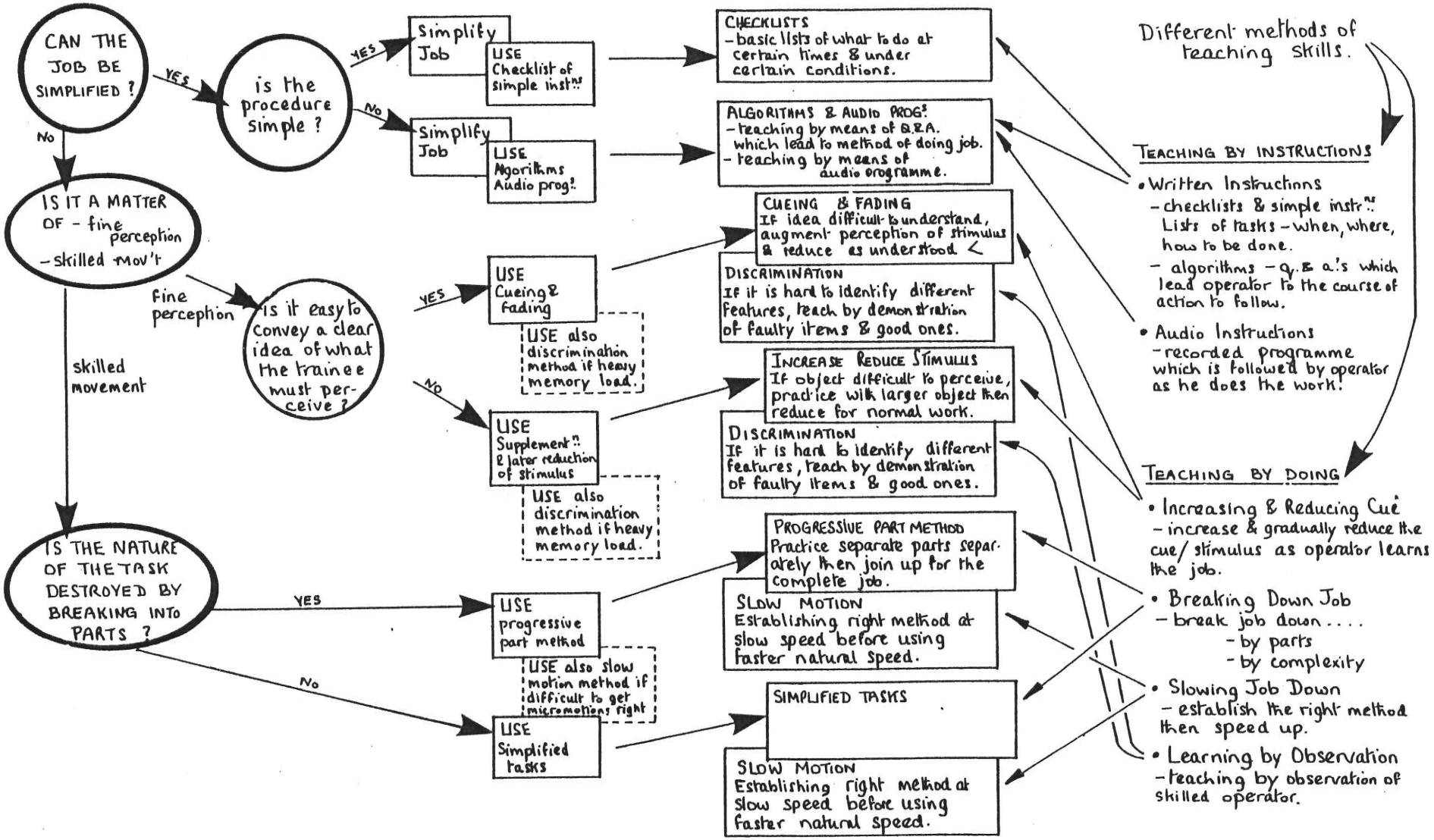
TRAINING DESIGN ALGORITHM

DEALING WITH SUBJECT MATTER (COMPREHENDING)



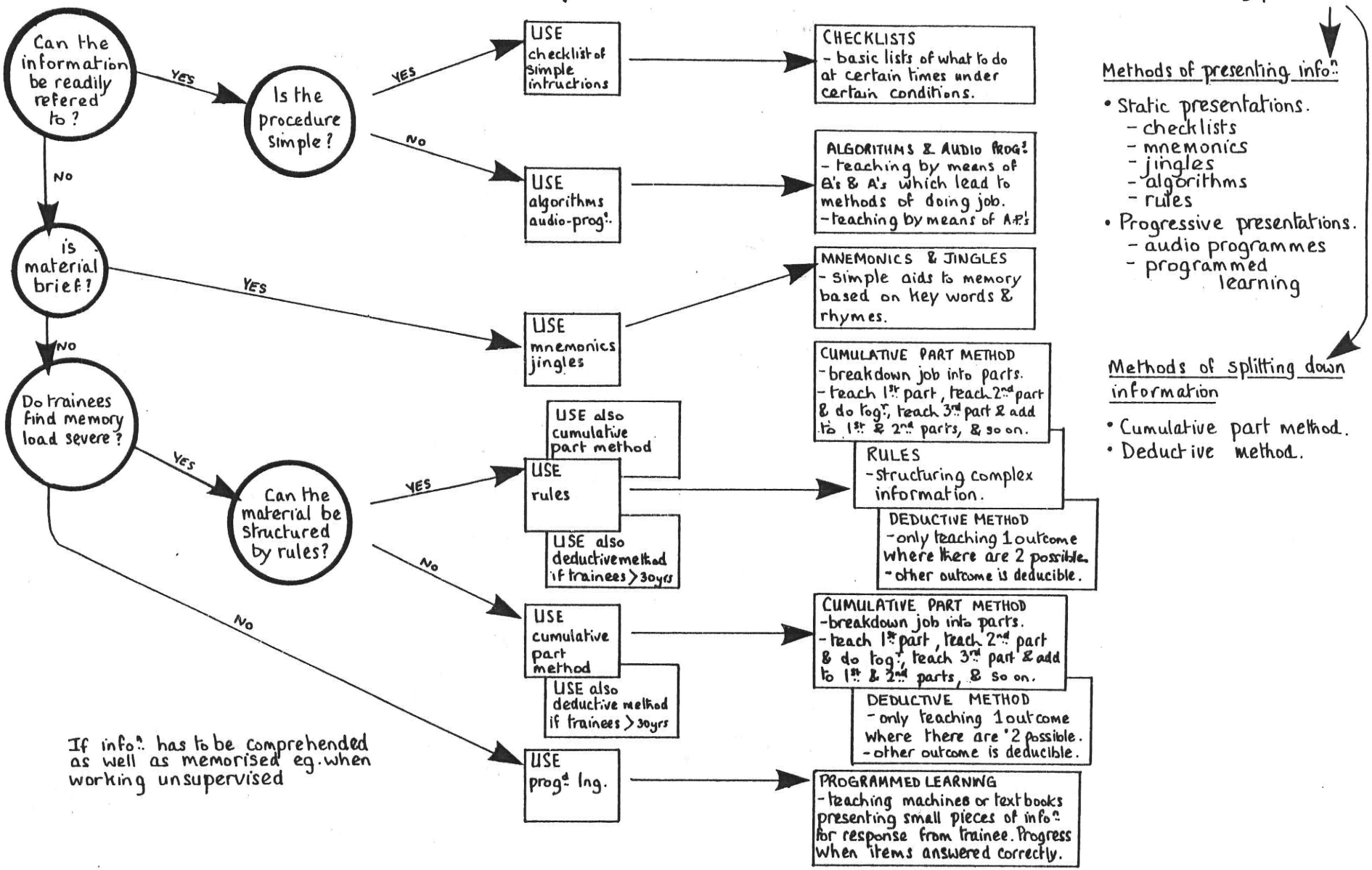
TRAINING DESIGN ALGORITHM

DOING SKILLED PHYSICAL WORK (REFLEX DEVELOPMENT)

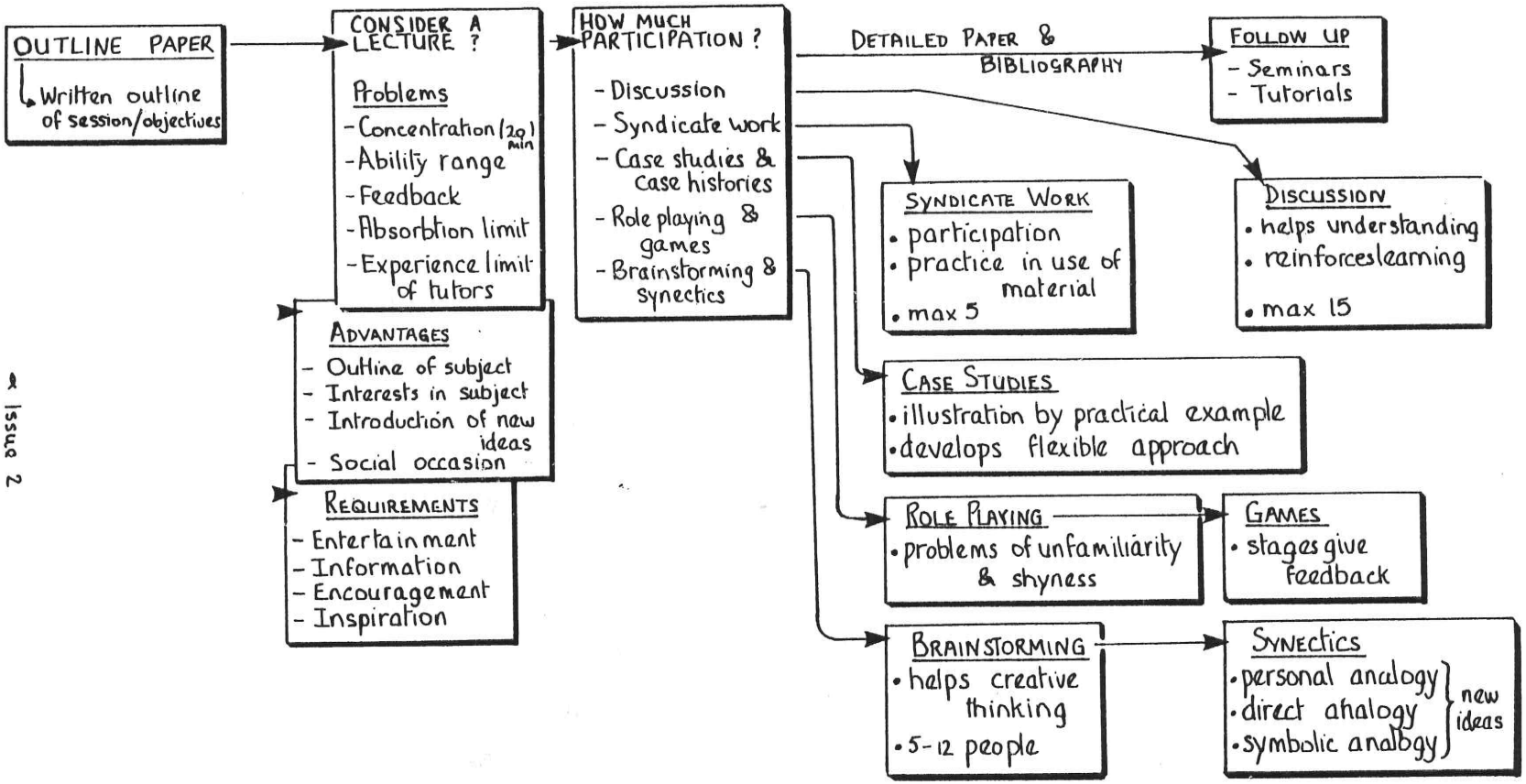


TRAINING DESIGN ALGORITHM

MEMORISING & PROCEDURE LEARNING



HOW TO STRUCTURE A TRAINING SESSION



Discussion Groups

- What are they ?
- Why have them ?
- How to organise them ?
- The trainers' role
- Procedure

Discussion Groups (What are they ?)

- They are a means by which a trainer gets a group to think through a subject.

Discussion Groups

- They are often used with great benefit to follow a lecture, especially when course members have experience which can be shared.

Why have discussion groups ?

- to share experience,
- to enable people to relate ideas to their own problems,
- to broaden a person's perception.

The trainer's role

- referee
- not a preacher
- encourage them to contribute
- prepare to prompt
- be open minded & encourage group to be
- avoid irrelevances – carefully
- tactful
- get participants to be specific – ask for examples.

How to organise discussion groups

- numbers.
- level of knowledge & background.
- use of colleagues.
- preparation by trainer.

Numbers

- more than 12 and extroverts dominate; introverts shut out.
- fewer than 6 leads to shortage of ideas.
- optimum 6 → 9

Level of knowledge & background

- persons with inadequate knowledge need to be 'carried'
- persons with diverse backgrounds can improve discussion & widen appreciation of topic.

Preparation by trainer

- prepare the 'basic knowledge' for the group.
- show the relevance of the discussion.
- plan questions to bring out 'basic' points. Keep them 'open-ended'. (How, Why, What?)

Use of colleagues

- peers can undermine each other.
- senior colleagues may overawe juniors.

Procedure

- open discussion
- write up first heading
  - wait for contributions,
  - listen,
  - facilitate,
  - summarise.
- write up next heading, etc.
- summarise overall conclusions

Open Discussion

- explain how session will be run,
- outline the topic,
- explain the relevance.

INDIVIDUAL & GROUP DISCUSSIONS

* WHAT TYPES OF DISCUSSION
* INDIVIDUAL DISCUSSIONS
* GROUP DISCUSSIONS
* FACTORS INHIBITING DISCUSSION

DISCUSSION
- Definition.
- Types of discussion.
- The approach.
- Why have discussions?

DEFINITION
- An exchange of ideas between two or more people.
- An opportunity for the people to align their thinking.
(In a debate, one party tries to convert the other(s) to his/her point of view)

INDIVIDUAL DISCUSSIONS
- Plan / decide on objectives.
- Use questions to keep the subject 'moving'.
- Consider the process:-
  - the Introduction,
  - the Main Body,
  - the Summary.

Using open Q's

TYPES OF DISCUSSION
- Exploring a subject.
- Understanding each other.
- Ventilating viewpoints.
- Analyse & solve a problem.
- Generate ideas / examine possibilities & evaluate.
- Reach agreement / take a decision.

FACTORS INHIBITING DISCUSSION will include:
- Ignorance of the subject.
- An unplanned approach.
- Lack of self confidence.
- To large a group.
- Fear of criticism & loss of face

GROUP DISCUSSIONS
Stages are :-
- Preparing to lead the discussion.
- Preparing the room.
- Leading the discussion.
- Dealing with problems.

THE APPROACH
- What do you want ?
- What does he/she want ?
  - needs & constraints.
- Planned approach,
  - what kinds of question.
- Understanding others' attitudes
  - listening.
- Summarising
- Terminating positively

LEADING THE DISCUSSION
- Openning the session.
- Leading the session
  - serving the group,
  - controlling,
  - respecting opinions,
  - keeping to the subject,
  - summarising,
  - reflecting back Q's,
  - avoid telling others they are wrong,
  - writing up discussion points.

DEALING WITH PROBLEMS eg.
- Dogmatic individuals,
- Argumentative types,
- Silent persons,
- Talkative individuals,
- The 'know-all' types,
- Persons who are just not interested.
- Red herrings & tangents.
- How to close the discussion.

WHY HAVE DISCUSSIONS ?
- Motivation
- Group dynamics

MOTIVATION
- Sharing in the outcome.
- Motivated to get success.

GROUP DYNAMICS
- The forces generated by group participation

FILMS :-
'Meetings, Bloody Meetings'
'The one-sided triangle'

PAPERS A 184 - Costing & evaluating trg.
A 487 - Evaluation of trg.

EVALUATION OF TRAINING

* What is evaluation ?
* At what level can training be evaluated ?
* What techniques are available ?
* What restrictions are there ?

VALIDATION

- is the training meeting its objectives?
- are they the right objectives ?

EVALUATION is :-

the monitoring of training & the training function, for its social and financial benefits and the costs incurred.

LEVELS OF EVALUATION

- Chain of training effects
- Level of - Evaluation
  - Setting objectives

hence

- Different techniques

- Reactions.
- Learning.
- Changes in Job/ Individual behaviour.
- Changes in the organisation.
- Changes in the achievement of ultimate goals.

FORMULATING THE EVALUATION STRATEGY

depends upon :-

- resources
- acceptability
- ability to formulate objectives
- usefulness/accuracy of data
- training expertise
- willingness to provide information

EVALUATION TECHNIQUES for different LEARNING LEVELS

LEARNING LEVEL	TECHNIQUE
• Reactions	- Classroom feedback / scales / notebooks.
• Learning	- Tests / essays / attitude questionnaires.
• Job behaviour	- Observer diaries / observation of specific incidents / coaching / projects
• Organisation	- Production / Turnover indices. Studies of organisation climate.
• Ultimate value	- Cost-benefit analysis / human resource accounting

HOW PEOPLE LEARN

* WHAT IS LEARNING ?
* THE THEORIES OF LEARNING
* WHAT CHANGES ARE WE SEEKING ?
* WHY DO PEOPLE CHANGE ?
* HOW CAN WE CHANGE THEM ?
* WHAT MAKES ADULTS WANT TO LEARN ?
* WHAT CAN YOU DO ?

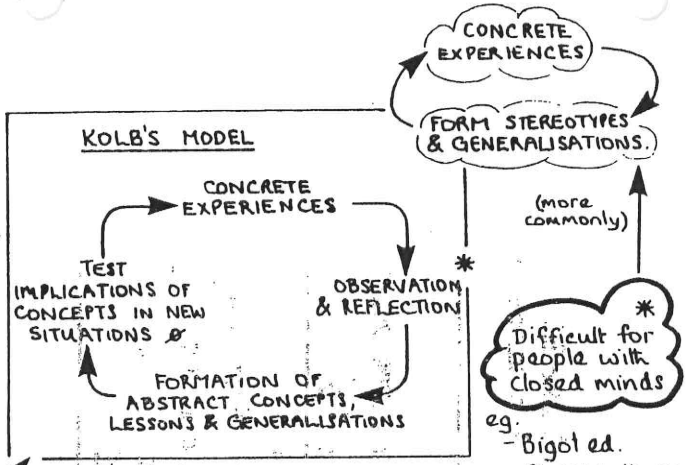
WHAT IS LEARNING ?

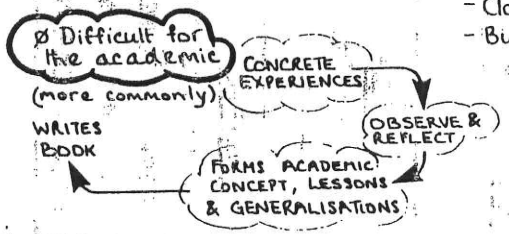
- Acquiring or developing
  - knowledge,
  - skill.
- Increased competence to deal with the environment.
- Changing attitudes & behaviour.

THEORIES OF LEARNING

- Behaviourist :- people learn to behave in certain ways trying to avoid pain.
- Cognitive theory :- man thinks & forms ideas &, as a result of success of those ideas, changes his behaviour

KOLB'S MODEL





WHAT CAN YOU DO ?

- Create an atmosphere of openness & confidentiality.
- Make people aware of their problems by asking questions.
- Make people aware of different interpretations of situations.
- Encourage exploration of ideas.
- Encourage people to think & feel & to think around the subject.
- Get people actively doing things.

RUN YOUR COURSES WELL

WHAT CHANGES ARE WE SEEKING ?

- Show more initiative.
- Be more creative.
- Confront their problems.
- Question what is happening.

WHY DO PEOPLE CHANGE ?

- If they have the ability to change
- If the system allows or encourages them to.
- If they are forced or coerced to.
- If they want to.

BARRIERS TO LEARNING

- Pride & self image.
- Lack of confidence.
- Lack of interest & commitment.

HOW CAN WE CHANGE THEM ?

- Coerce them - with certificates,
  - blocking promotion
- ~~Make~~ HELP them want to learn.

ADULTS

- Have a lot of experience & some will learn from it.
- Have set habits.
- Are proud.
- Like to see themselves as independant.
- Have things to lose.
- Do not like choice or ambiguity
- Have other preoccupations than learning.
- Can change.
- May find it hard to change.
- Have something to contribute.
- Fear going back to school.
- Fear falling behind or being replaced.

ADULT LEARNING

- a move from dependence to independence.

TIME

PROJECT WORK	INDEPENDENCE
SYNDICATE WORK	INTER- DEPENDENCE
LECTURE	DEPENDENCE

WHAT MAKES ADULTS WANT TO LEARN ?

- They must see the relevance & value of what they are learning & know what goals are set.
- THEY must be doing something.
- When they can relate what they are doing to past experiences.

PAPERS :-
A.352 - MEMORY, LEARNING & THE PSYCHOLOGY OF STUDY.
A.381 - TEACHING OLDER STUDENTS.
A.459 - TEACHING STUDENTS TO LEARN & REMEMBER
A.492 - LEARNING BY DOING

TEACHING PREPARATION

* What does the class know ?
* What shall I teach ?
* What method should I use ?
* What control is necessary ?
* How about my trainees ?

WHAT DO THEY KNOW ?
Is a pretest.....
- possible ?
- necessary ?
- useful revision ?

WHAT IS MY SUBJECT MATTER ?
Can it be divided into :-
- must know,
- should know,
- could know.

Is it prepared ? → my notes, my handouts, my aids (audio, visual, etc.)

sequence, logic, techniques.

WHAT IS THE BEST METHOD ?
Am I teaching them to :-
- acquire skills ? → **USE** lecture, demonstration, tutorials. (independant study)
- acquire knowledge ? → **USE** lecture, role-play, group discussion, programmed learning, computer-assisted learning. (independent study)
- change attitudes ? → **USE** group discussion, tutorials, role-play, case studies, sensitivity training. (independent study)
- a mixture of these? → **USE** tutorial, case study, games, computer-assisted learning, (independent study)

HOW MUCH CONTROL IS NECESSARY ?
- student centred → **USE** lecture, tutorial.
- tutor centred

STUDENT ATTITUDES
- Are their minds open / closed.?
- Was previous work assimilated?
- Is the class motivated to learn?

6.50

Issue 2

A 377 - Lecture method.
A 379 - How to set lesson objectives
A 381 - Teaching Older Students
A 459 - Tchg. students to learn & remember
A 487 - Evaluation of Training
A 492 - Learning by doing

Contents

PART 1 MOTIVATION

Motivation by Setting Objectives	7.01
Motivation of People at Work	7.02
Motivating Employees	7.03
Motivational Theory & Man	7.04
Mgt. & Mot'n of People 1 (as Individuals)	7.05
Mgt. & Mot'n of People 2 (in Groups)	7.06
Mgt. & Mot'n of People 3 (in Organisations)	7.07
Practical Employee Involvement	7.08
Pay and Motivation	7.09
Non-Financial Incentives	7.10
Self Motivation	7.11
Motivation Theory & its Problems	7.12

PART 2 PROBLEM SOLVING & DECISION MAKING

Problem Analysis	7.13
Problem Analysis & Decision Making	7.14
Problem Identification 1	7.15
Problem Identification 2	7.16
Problem Analysis in Groups	7.17
The Problem Solving Process	7.18
Taking Action	7.19
Problem Solving & Decision Taking	7.20
Brainstorming & Synectics	7.21
Synectics - A Creative Thinking Process	7.22
Decision Making Process (KJ Method)	7.23
Problem Identification 3	7.24
Problem Solving	7.25

PART 3 GROUP BEHAVIOUR

Group Behaviour	7.26
Group Behaviour - Observation Sheet	7.27
Group Norms	7.28
Informal Groups in Organisations	7.29

PART 4 COMMUNICATIONS / COMMUNICATING

Communicating	7.30
Reading Faster	7.31
Memorising	7.32
What is Communication ?	7.33
Organisation of Meetings	7.34
Meetings	7.35
Listening	7.36
Letter Writing	7.37
Report Writing	7.38

PART 5 MANAGEMENT OF TIME

Management of Time - Personal	7.39
Planning & Controlling Time	7.40
Time Management - Using Personal Time Better	7.41
Management of Time	7.42
Managing your Time	7.43
Setting Objectives - Planning	7.44
Setting Time Objectives	7.45
Managing Departmental Time	7.46
Recording Time	7.47
Recording Information - Diary	7.48
Using Time Effectively	7.49
Self Management - Setting Priorities	7.50

PART 6 KEYWORD INDEX

Keyword Index	p 51
List of associated papers	p 54

The following typed information papers (A4), forms and exercises accompany certain of the Outlines in Volume 7. Their value lies in the way they expand on aspects of the Outlines themselves. Their use is optional.

INFORMATION PAPERS

A.2	Effective thinking and Communication
A.4	Effective Speaking
A.24	Problem Analysis
A.25	Decision Making
A.31	Networks
A.54	Introduction to work study
A.95	Motivation and Leadership
A.101	Self Management
A.106	Principles of Report Writing
A.107	The choice of words
A.113	The conduct of meetings
A.168	Sales Meetings
A.196	Provision of Management Information
A.200	Sales Letter Writing
A.201	Persuasive Communication
A.218	Job Enrichment & Motivation
A.290	Introduction to office work study
A.299	Algorithms
A.315	Groups at Work
A.329	Listening
A.343	Group Psychology
A.349	Careful Speaking & Effective Listening
A.352	Memory, Learning & the Psychology of Study
A.361	Setting Personal Goals
A.362	Irrational Aspects of Decision Making
A.364	Interviewing for Information
A.381	Teaching Older Students
A.430	Business Charts
A.444	What to observe in Groups
A.454	The use of BARSAC sheets
A.458	Understanding Group Behaviour
A.459	Teaching Students to Remember
A.460	How to lead a Discussion
A.466	The Management Grid
A.480	Pairs Comparison
A.482	Checklist for analysing the quality of reports
A.497	The Sentence
A.501	Network Analysis
A.537	Financial & Business Ratios
A.585	Cost Benefit Analysis

A.592	Mechanistic & Organic Organisation
A.594	Behavioural Science Theories
A.598	Intergroup Behaviour
A.623	Dealing with Differences
A.625	Meetings Checklist
A.630	Effective Reading
A.636	Creativity & Innovation
A.637	Setting Objectives
A.639	Creative Thinking & Brainstorming
A.655	The STP Model of Problem Analysis
A.707	Layers of a Problem
A.715	The 6-box Organisational Model

EXERCISES

C.96	Activity Sampling Exercise
C.97	Diary Editing Exercise
C.109	Financial Analysis
C.233	Training Records
C.290	In-tray Exercise
C.324	Setting Personal Goals (Paired Comparison Exercise)
C.376	Time Logging Exercise
C.417	The President's Solution (Ex)

FORMS

F	27; 37; 38; 40-45; 72; 75-80; 89; 90; 93-95; 100-104

QUESTIONNAIRES

Q.210	Leadership & Motivation Questionnaire
Q.212	Job Enrichment Questionnaire

NOTE Recommended films are not supplied by P-E Consulting Group or by Marshfield Publications Ltd. They may be obtained from the usual film hire agencies.

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MOTIVATION by SETTING OBJECTIVES

* WHAT IS MOTIVATION ?
* WHAT MOTIVATES PEOPLE AT WORK ?
* WHAT 'DETERS' PEOPLE FROM WANTING TO WORK ?
* HOW DO OBJECTIVES MOTIVATE ?

MOTIVATION & MOVEMENT

- Motivation is doing a job because you want to do it.
- Movement is doing a job because you have to do it.

WHAT MOTIVATES PEOPLE AT WORK ?

- The JOB
  - Meaningful, interesting work.
  - A chance to grow.
  - A chance to achieve.
  - Responsibility.
  - Recognition of achievement.
- The ENVIRONMENT
  - Entrepreneurial.
  - Innovative & challenging.
  - Competitive.
  - Fair treatment.
- The PERSON
  - Having abilities & the opportunity to use them.
  - The attitude of the individual to their job & their environment.

WHAT DETERS PEOPLE FROM WANTING TO WORK ?

- The JOB
  - Dull, uninteresting work.
  - Unskilled work.
  - Pointless work.
  - Working to other people's ideas.
- The ENVIRONMENT
  - Dull.
  - Unchanging.
  - Unfair.
- The PERSON
  - Wrong attitude to work.

HOW DO OBJECTIVES MOTIVATE ?

by :-

- Making work more meaningful, increasing participation, & giving a sense of achievement.
- Helping planning & reducing frustration.
- Helping staff to control their work & thus reduce stress.
- Foreseeing development needs & helping staff develop to handle more interesting work.

HOW DO YOU MOTIVATE THROUGH OBJECTIVES ?

- Get them to
  - analyse their jobs,
  - set meaningful objectives,
  - plan job improvements.

  (in conjunction with their boss)
- Encourage them to
  - schedule their programme.
  - do their job & enjoy it.
  - monitor their progress.

See :-
A637-Setting Objectives
Film :- 'Jumping for the Jellybeans'

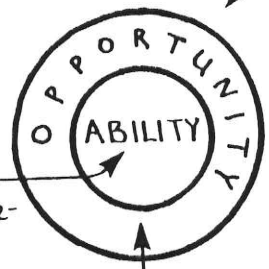
MOTIVATION of PEOPLE AT WORK

* WHAT MAKES PEOPLE WANT TO WORK ?
* WHY PEOPLE DON'T WANT TO WORK

PEOPLE WANT TO WORK

'When they experience happiness from what they do.'

- Motivating factors, control :
  - quality of working life,
  - quality of human experiences at work.
- Motivating factors, inherent in the job:
  - achievement & growth at work,
  - recognition & increased responsibility,
  - meaningful & interesting work.
- Motivation from good management :
  - respect for/from other people,
  - opportunities for development,
  - challenging work.
- Motivation from ability & opportunity



ABILITY comes by training & on-the-job development.

OPPORTUNITY, through:

- JOB ENRICHMENT, giving people the opportunity to use their abilities.
- JOB PLANNING, hiring people for 'larger' jobs with the ability to do the 'smaller' job.

PEOPLE DON'T WANT TO WORK

'When they experience unhappiness from the way they are treated.'

- If 'HYGIENE FACTORS' are wrong
  - not preventing hurt,
  - not preventing dis-satisfaction.
- Hygiene factors give 'movement', i.e. you have to do it! Movement comes from K.I.T.A.

HYGIENE FACTORS cover

- Pay & status.
- Working conditions.
- Supervision.
- Human relations.

	Positive K.I.T.A.	Negative K.I.T.A.
Mental K.I.T.A.	BRIBE	THREAT
Physical K.I.T.A.	CARROT	STICK

Long term problems from K.I.T.A. :-

Positive K.I.T.A. - Rewards become a right & have to be increased to give the same performance level.

Negative K.I.T.A. - You generate pain which is never forgotten & revenge psychology develops as they try to get their own back.

People want to work.....
- to do something useful with their lives & grow psychologically.

People don't want to work....
- if the job is not worthwhile,
- if they think they are being treated unfairly.

Papers :-
A 95 - Motivation & Leadership
A 218 - Job Enrichment & Motivation
A 361 - Setting Personal Goals
C. 324 - Setting Personal Goals - exercise
Film :- Jumping for the Jellybeans.

MOTIVATING EMPLOYEES

* Nature & Definition
* Symptons of poor motivation
* Principles of motivation

DEFINITION

- achieving results through people.
- creating an impulse which will move a person towards a desired action/activity.

WHICH PERSONS & WHY ?

- your boss (accept ideas, provide resources, etc.)
- your subordinates (maintain output, quality & standards, etc.)
- your peers (general wide-ranging co-operation)
- your suppliers (meet delivery deadlines, quality, etc.)
- your customers (to buy, or be patient.)

WHICH MOTIVATORS ?

- see Maslow's list of 'needs'

HOW TO MOTIVATE ?

- gradually, over a period of time, to avoid over-stimulation & a rapid fall-off of enthusiasm.

PRINCIPLES OF MOTIVATION

- Sticks
- Carrots.

'STICKS' - fear of loss of employment.

'CARROTS'

- Financial incentives
  - commission
  - bonuses
  - overtime
  - fringe benefits & 'perks' (co. car)
  - productivity bonuses
  - etc. (p.b.r.)
- Non-Financial incentives
  - advancement
  - prizes for extended effort
  - non-contributory pensions
  - etc.

leads to extra recognition, whole family enthusiasm & goodwill.

- Leadership incentives
  - improved I.R. climate.
  - improved 'hygiene factors'.
  - team building.
  - improved 2-way communications
  - whole tasks & devolved responsibility
  - training opportunities

SYMPTOMS OF POOR MOTIVATION

- lateness.
- absenteeism.
- vandalism & accidents.
- a wish to work slowly.

WHY SHOULD THEY WANT TO WORK SLOWLY ?

- fear of redundancy,
  - job ends quickly, leading to
  - jobs telescoped.
- extend earnings
  - more overtime.
  - to apply industrial pressure to support wage demands
- resentment
  - 'hygiene factors'.
  - lack of appreciation.
- boring, repetitive jobs.
- lack of communication
  - ignorance of objectives.
  - ignorance of progress.
  - loss of faith in mgt.

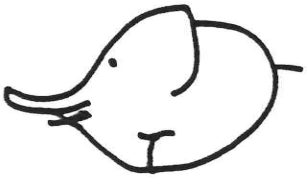
HOW TO OVERCOME THIS

by :-

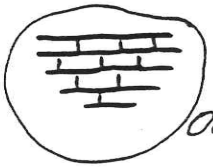
increased responsibility.
increased recognition.
sense of achievement.
growth & learning
advancement.
better security.
effective 2-way communications.

MOTIVATIONAL THEORY & MAN

The Six Men of Indostan and the Elephant.



It was six men of Indostan,
to learning much inclined,
who went to see the Elephant
(though all of them were blind),
That each by observation
Might satisfy his mind.



The first approached the Elephant,
And happening to fall
against his broad and sturdy side
At once began to bawl:
"God bless me! but the Elephant
is very like a wall!"

The second feeling of the tusk
Cried "Ho! what have we here
So very round and smooth and sharp?
To me 'tis very clear
This wonder of an Elephant
Is very like a spear."

The third approached the animal
And, happening to take
The squirming trunk within his hands
Thus boldly up he spake
"I see" quoth he "The Elephant
Is very like a snake".

The fourth reached out an eager hand
and felt about the base:
"What most this wonderous beast is like
is very plain" quoth he
"Tis clear enough the Elephant
Is very like a tree".

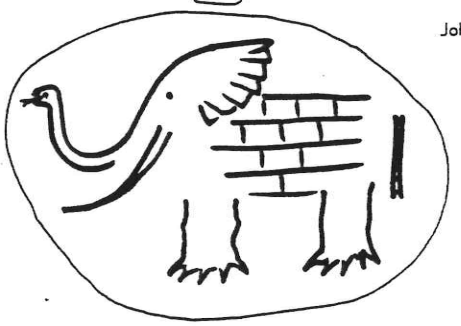
The fifth who chanced to touch an ear
Said "E'en the blindest man
can tell what this resembles most.
Deny the fact who can
This marvel of an Elephant
Is very like a fan".

The sixth no sooner had begun
about the beast to grope
Than siezing on the swinging tail
That fell within his scope.
"I see" quoth he, "The Elephant
Is very like a rope".

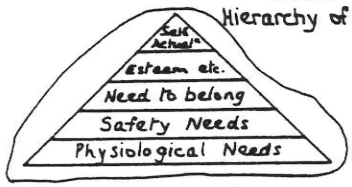
And so these men of Indostan
Disputed loud and long
Each in his own opinion
Exceeding stiff and strong
Though each was partly in the right
They all were in the wrong.

John Godfrey Saxe

"THE ELEPHANT"
by the six blind men
of Indostan



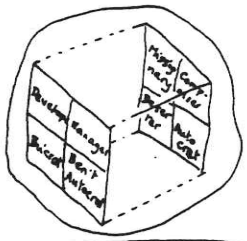
"MASLOW" (1943)
Hierarchy of Needs



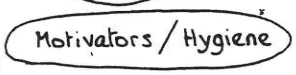
"Macgregor" (1960)
Theory X & Theory Y

"Adair"
Action Centred
Leadership

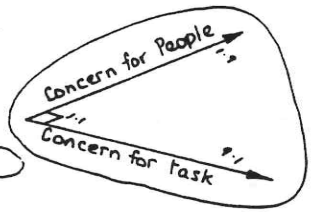
"Redin" (1970)
3-D Managerial Grid



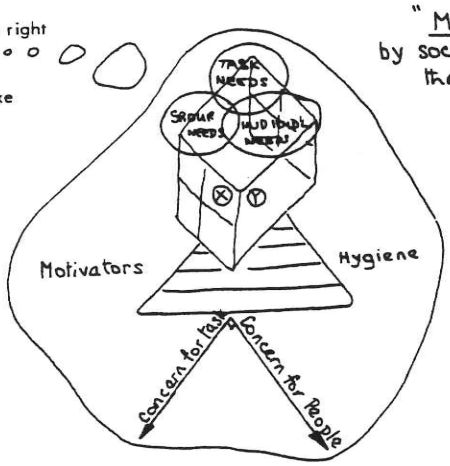
"Herzberg" (1959)
Motivation Theory



"Blake & Mouton" (1966)
Management Grid



"MAN"
by social science
theory.



MANAGEMENT & MOTIVATION of PEOPLE (1)

(What drives Individuals)

* MOTIVATION THEORIES
* SOCIOLOGICAL CAVEATS
* CONCLUSION

CONCLUSION

Motivation of individuals people varies with their reaction to a situation which depends upon :-

PAST EXPERIENCE
- upbringing,
- education,
- experience at work.

PRESENT SITUATION
- one's own view of the situation,
- how you perceive your colleagues' views.

PERCEPTION OF THE FUTURE
- prospects within this organisation,
- prospects outside this organisation.

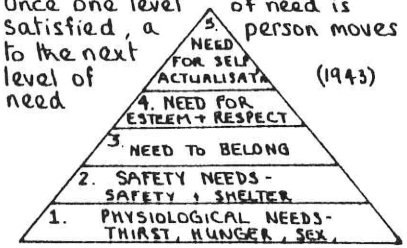
Motivation theories give an idea how some individuals may react in certain circumstances & how they may be motiv'd.

MOTIVATION THEORIES

- Maslow - Hierarchy of needs
- Herzberg - Motivation/Hygiene Theory
- Alderfer - E.R.G. Theory
- Goldthorpe - Theory on work orientation
- Fineman - Goal Setting Theory
- Vroom - Expectancy Theory
- Pope - Theory of 7 Deadly Sins

Maslow's Hierarchy of Needs

Once one level of need is satisfied, a person moves to the next level of need (1943)



HERZBERG - Motivation/Hygiene Theory (1959)

Motivators motivate; hygiene factors may demotivate.

Motivators - achievement,
- recognition,
- responsibility,
- advancement,
- growth,
- interesting work.

Hygiene Factors - conditions,
- salary, status, security,
- company policy,
- colleague/staff relationships, etc.

ALDERFER - 'E.R.G. Theory' (1969)

People have :
- Existence needs (Maslow 1 & 2)
- Relationship needs (" 3 & pt 4)
- Growth needs (" pt 4 & 5)

These needs are either :
- CHRONIC .... always there, or
- EPISODIC ... sometimes there.

POPE - 'Deadly Sin Theory'

"Motivation theory indicates that the basic motivators are the 7 deadly sins"

Pride; Lust; Anger; Gluttony; Envy; Sloth & Covetousness.

VROOM - 'Expectancy Theory'

"Performance depends not only on motivation & ability but also on an individual's perception of how they can achieve their own objectives." (1964)

FINEMAN - 'Goal Setting Theory'

"People are motivated by setting realistic, specific goals."

GOLDTHORPE

"Diffent people have different attitudes to work due to factors outside their work environment." (1968)

Worker type	Orientation
Affluent	Instrumental
Salaried/Professional	Bureaucratic
Traditional	Solidaristic

SOCIOLOGICAL CAVEATS

- Garfinkle & Silverman - Phenomenology
- Goldthorpe & Lockwood - Action Theory

Action Theory

"Individuals' attitude to work controls their reactions to jobs which might appear boring (or challenging) to others."

Phenomenology

"The actual motivation comes from the thoughts of the individual & not what the social scientist thinks you should think."

PAPERS :-
- A 95 - Motivation & Leadership
- A 218 - Job Enrichment & Motivation
- A 594 - Behavioural Science Theories
- Q 212 - Job Enrichment Questionnaire

∝ Issue 2

MANAGEMENT & MOTIVATION of PEOPLE (2)

(What affects people in groups?)

* GROUP EFFECTS
* GROUP ANALYSIS
* GROUP TRAINING TECHNIQUES
* CONCLUSION

GROUP EFFECTS
- Fears of people in groups
- Feelings of people in groups
- Behaviour of people in groups

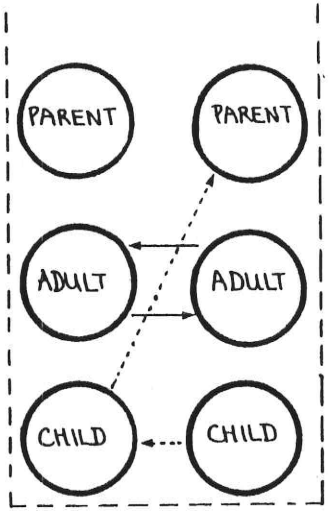
FEARS OF PEOPLE IN GPS.
- Fear of be rejected.
- Fear of being ridiculed.
- Fear of being influenced.

FEELINGS OF PEOPLE IN GPS.
- Need for identity in group.
- Need to influence group (& feelings of frustration if failing).
- Need for recognition by the group.

BEHAVIOUR OF PEOPLE IN GPS.
- SOFT RESPONSE
  - forming alliances
  - building the group
- MAINTENANCE
  - initiating ideas
  - clarifying ideas
  - summarising agreement
  - harmonising
  - compromising
  - encouraging (bringing in)
  - giving structure
- HARD RESPONSE
  - Bulldozing
  - damaging gp. cohesion
  - shutting out
- WITHDRAWAL - result of frustration.

GROUP ANALYSIS
- Behaviour analysis
- Transactional analysis

TRANSACTIONAL ANALYSIS
(ERIC BERNE)
Looks at communication between people in terms of their EGOSTATE



CONCLUSION
Motivation of people in work groups is affected substantially by the group. Managers should be aware of their behaviour & the behaviour of others in the group situation.

GROUP TRAINING TECHNIQUES
- T-Group (Lewin)
"Provides an extensive experience of how people affect each other, how a group forms, maintains itself & deals with people."
- COVERDALE TRAINING
"Groups (6-8) of managers work on tasks & analyse their effectiveness."
- INTERACTIVE SKILLS TRAINING
"Examine communications, verbal & non-verbal, & provide a learning situation to develop skills."

DEVELOPMENT OF GROUPS

Stage 1 - Formal & insecure
- Acceptance of procedures, roles & seating positions.
- Talking to briefs.
- Danger from pushing & changing briefs.

Stage 2 - Secure, less formal
- Reaction against roles, procedures & previous leaders.
- Move away from briefs.

Stage 3 - Efficient working
- Knowledge of abilities.
- Trust in integrity.
- Use sub-groups.

FILMS:
Blowing hot & cold.
The one-sided triangle

MANAGEMENT & MOTIVATION of PEOPLE (3)

(What motivates people in Organisations)

* MANAGEMENT STYLE
* ORGANISATION THEORY
* CONCLUSION

MANAGEMENT STYLE
- McGregor - Theory X & Theory Y
- Blake & Mouton - Mgt. Grid
- Reddin - 3 dimensional grid
- Adair - Action Centred L'ship
- Mayo - Hawthorn Experiment

McGregor "Managers' styles fall into 2 categories due to their theories about man's motivation to work."

THEORY X - Most people are lazy, are unable to discipline & control their work, prize security & shirk responsibility. Thus people need external incentives & to be told what to do.

THEORY Y - All people find work natural, accept self discipline, seek responsibility & like commitments. Thus people can only realise their potential if they are allowed to use their imagination and creativity.

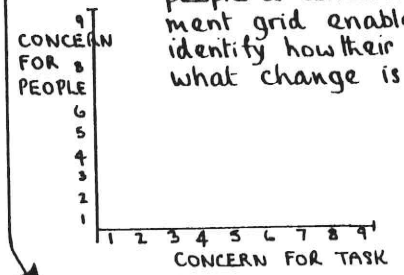
MAYO - Hawthorn Experiment

"In organisations where change is made, the nature of that change can have very much less effect than the way in which the change is carried out."

ADAIR - Action Centered Leadership

"In groups which are doing something, there are 3 overlapping areas of need which must be looked after if the group is to be effective."

BLAKE & MOUTON "There are two variables which determine a manager's performance - concern for people & concern for task. The management grid enables managers to identify how their concerns balance & what change is needed."

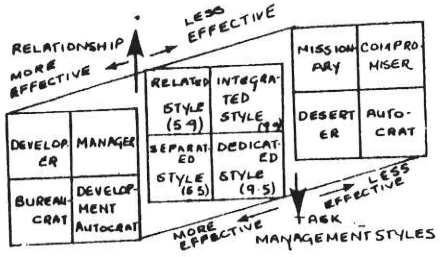


CONCLUSION Any major changes made in an organisation can have effects throughout the organisation. Major changes should be PLANNED & looked at ORGANISATION WIDE. The principles of organisational development (O.D.) are aimed at bringing increased effectiveness through PLANNED INTERVENTIONS in the organisation's procedures using behavioural science knowledge.

ORGANISATION THEORY
- Burns & Stalker - Mechanistic & Organic Organisations
- Trist - Socio-technical System
- Organ?. - span of control
- Principles of organisation

BURNS & STALKER - "Different mgt. systems are appropriate to different market & technological situations. In rapid change - use an ORGANIC system; in a more stable situation adopt a MECHANISTIC system."

REDDIN - '3 Dimensional Grid' - extends a part of the management grid to look at more effective management styles.



PRINCIPLES OF ORGANISATION

Relationships between people must be clearly understood:
- Directly responsible,
- Functionally responsible,
- Lateral relationships,
- Staff relationships.

SPAN OF CONTROL - the numbers who can be managed are controlled by:
- the level of responsibility,
- nature & complexity of the work,
- facility for communication,
- the abilities & characteristics of the manager & the staff.

TRIST - Sociotechnical System

"Any change in an organisation must be planned in sympathy with its:
- technical system,
- social system,
- economic climate."

PAPERS:
- A 95 - Motivation & Leadership
- A 466 - Management Grid
- A 592 - Mechanistic & Organic Orgns
- Q 210 - L'ship & Motiv'n Questionnaire

ISSUE 2 ∝

7.07

PRACTICAL EMPLOYEE INVOLVEMENT

* Why involve employees ?
* How to involve employees

WHY INVOLVE EMPLOYEES ?

- Motivation.
- Channels efforts.
- Increased loyalty.

MOTIVATION

- Motivation comes from :-
  - feelings of participation,
  - recognition of ability to help,
  - achievement of own solution,
  - more interesting & creative job,
  - increased responsibility & scope.

MOTIVATION

- Herzberg's motivators :-
  - achievement,
  - recognition,
  - interesting work,
  - responsibility,
  - advancement,
  - growth.

INCREASED LOYALTY

- Increase loyalty by helping employees to see how their future & the company's future can be achieved together.
- Increase loyalty by recognising ability of all employees to help the company by :-
  - doing their job,
  - solving problems,
  - giving ideas.

HOW TO INVOLVE EMPLOYEES

- Day-to-day involvement.
- "Systems" for involvement.

DAY-TO-DAY INVOLVEMENT

- Listening – paraphrasing,
  – positive response,
  – using ideas from staff.
- Being open – authentic role model,
  – considering facts & feelings,
  – theirs & yours.
- Team building – group problem solving,
  – intergroup interventions.

SYSTEMS FOR INVOLVEMENT

- Briefing groups.
- Quality circles.
- Group problem solving.
- Management by objectives.
- Manpower planning.

CHANNEL EFFORT

- Channel effort by sharing their & company's objectives, problems & opportunities.
- Bring together employee's needs & company's needs.

CHANNEL EFFORT

- VROOM "Expectancy theory".
- Performance depends not only on motivation & ability but also on the person's perception of how they can achieve their own objectives.

BRIEFING GROUPS

- Passing ideas down the org^n. by briefing one group who then brief their subordinates.
- Giving staff at all levels a chance to discuss ideas.
- Passing ideas up the org^n. following discussion at lower levels.

IMPLICATIONS

- Joint target setting,
- Delegation & trust,
- Individual responsibility,
- Company responsibility for staff.

MANPOWER PLANNING

- Planning future progress.
- Developing skills.
- Giving staff opportunity to grow

MANAGEMENT BY OBJECTIVES

- Staff throughout the org^n. discuss objectives set targets & monitor progress.

GROUP PROBLEM SOLVING

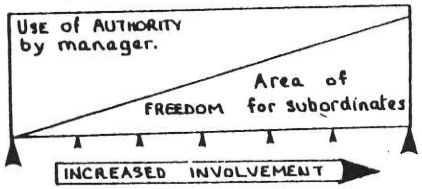
- K.J. Method of group problem solving.
- Bring groups together to recognise and work on their problems.

QUALITY CIRCLES

- Groups at lower levels in the org^n. discuss quality & production problems; solve problems & pass ideas up the org^n. for action to be taken.
- Facilitators are trained & approved to help groups work effectively & provide support & expertise.

CONTINUUM OF LEADERSHIP STYLES

(Tannenbaum & Schmidt)



Issue 2

PAY & MOTIVATION

* How does pay motivate?
* What must a pay system achieve?
* What non-financial incentives exist? (see 7.10)

PAY MOTIVATES by giving:-
- Greater buying power.
- A quantifiable measure of success.
- A quantifiable measure of appreciation.

PAY SYSTEMS must
- Be competitive → with other organisations to retain/attract sufficient staff of the right quality to achieve co. objectives.
- Be fair → be fair internally to avoid dissatisfaction arising from erosion of differentials.
- Provide encouragement → for the staff to give of their best without it being so expensive it damages future prospects

TECHNIQUES AVAILABLE to make it:-
- Competitive - interfirm comparison
  - earnings progression
- Fair - job evaluation
  - wage audit
- Encourage

ENCOURAGE through
- Work study based schemes.
- Non Work study schemes.

WORK STUDY BASED SCHEMES
- PIECEWORK - gives greater incentives
- MEASURED DAYWORK - gives improved I.R.

NON WORK STUDY SCHEMES
- Merit rating - used to reward management/staff/manual workers in the job they are doing.
- Profit-sharing - simple, practical but remote. Allocate units to staff - pay £x per unit.
- Commission pays a % on sales
- Prizes - for achieving targets
- Competitions - for best performance - a single prize
- Sales Bonus - pays % on different types of sales.
- RUCKER PLAN - (added value)
  - Calculate % wages : added value
  - Pays agreed % added value to hourly paid workers.
- SCANLON PLAN
  - Negotiate agreed % wages : sales
  - Pay agreed % sales value to all wage & salary earners.

WAGE AUDIT
- Analyse the wage situation periodically & comment on areas needing attention.

DISSATISFACTION caused by:-
- Changes in relative pay rates.
- Changes in relative gross pay.

JOB EVALUATION
- Determines worth of one job in relation to another without regard for personalities.

WHAT FACTORS MAY VARY?
- Spread of earnings
  - between departments.
  - within departments.
  - between GRADES
    - manual.
    - clerical.
    - supervisory.
    - management.
- Premium payments
  - % overtime
  - % bonus
  - % shift premium
- Performance

EARNINGS PROGRESSION
- Compare own firm's pay rate progression with the national norm.
- Consult GLACIER INST^TE of MGT. charts. (earnings progression curves.)

WHAT ARE THEY PAYING?
- BASE RATE per grade average.
- GROSS PAY per grade average.
- MAX. PAY for individuals in each grade.

Do they include...
- FRINGE BENEFITS (do yours compare?)
- How much OVERTIME?
- How much SHIFT PREMIUM?

INTER-FIRM COMPARISON
- Ask other firms.
- Read statistics.
- Ask the union!

NON-FINANCIAL INCENTIVES

METHODS OF INDUCING & MAINTAINING HIGHER PERFORMANCE

* CLOSE SUPERVISION
* MECHANICAL MEANS
* STATUS
* LEADERSHIP
* WELFARE SERVICES
* FRINGE BENEFITS

CLOSE SUPERVISION

Compare factory workers with
- shipyard workers,
- local government outworkers.

MECHANICAL MEANS

- Technological improvements
- Conveyors, automation, etc.

STATUS, promotion to:

- Manager.
- Specialist.
- Supervisor.

LEADERSHIP, through:

- Delegation.
- Firm discipline.
- Coordination.
- Good communication.
- Motivation techniques

FRINGE BENEFITS eg

- Company car.
- Tied house.
- Free transport.
- Subsidised canteens.
- Mortgage/loan assistance.
- Private education for children.
- Special insurance schemes.
- etc.

► Is the benefit > cost ?

WELFARE SERVICES

- Pension.
- Sick pay.
- Holidays.
- Recreation facilities.
- Medical care.
- etc.

► Do they justify their cost ?

SELF MOTIVATION

* What is motivation ?
* What motivates an individual ?
* How to increase your motivation

MOTIVATION & MOVEMENT

- MOTIVATION - is doing a job because you want to do it.
- MOVEMENT - is doing a job because you have to do it.

MOTIVATION

- You cannot motivate someone else. You can only create the situation in which he will be motivated.

WHAT MOTIVATES AN INDIVIDUAL ?

- Three leading theories
  - Herzberg,
  - Alderfer (& Maslow)
  - Fineman

HERZBERG

- Motivators
  - Achievement,
  - Recognition,
  - Interesting work,
  - Responsibility,
  - Advancement,
  - Growth.
- Hygiene Factors
  - Company Policy, Admin., & Supervision.
  - Working conditions.
  - Salary, status & security.
  - Relationships with colleagues & staff.

ALDERFER (& MASLOW)

- Existence needs
  - physiological & safety
- Relationship needs
  - belonging & gets respect
- Growth needs
  - self respect & growth

FINEMAN

- People are motivated to achieve realistic, specific goals.

MOTIVATIONAL PRACTICE

- What do you want out of life ?
  - Leadership,
  - Expertise,
  - Prestige,
  - Service,
  - Wealth,
  - Independence,
  - Affection,
  - Security,
  - Self-realization,
  - Duty,
  - Pleasure, etc.

CONCLUSION

- Motivation comes from one's ability to do a job & the opportunity to use that ability.

HOW TO INCREASE YOUR MOTIVATION ?

- How to increase your ability to do the job.
- How to increase your opportunity to use your ability.

INCREASING OPPORTUNITY

- Consider power to act
- Consider persuasion

PERSUASION

- People are only motivated to solve a problem if :-
  - they own the problem,
  - they own the solution.
- Use 'positive response'
  - win : win
  - market ideas - don't sell them.

POWER TO ACT

- If constraints are examined they are frequently found to be imagined.
- "I wish they would ....." Ask what benefits are wanted & how can I get those benefits ?
- Direct power = Ability to act.
  Indirect power = Ability to coerce / persuade
  Is your power really limited ?

INCREASING YOUR ABILITY

- What abilities do you want to increase ?
- How can you increase them ?

WHAT DO YOU WANT TO INCREASE?

- In present job.
- In next job.
- In overall career.

HOW TO INCRESE THEM ?

- Reading & home study.
- Courses & discussion.
- On-job training.

How long - each day/week/year ?

PAPERS :-
A 361 Setting Personal Goals
A 480 Pairs Comparison
C 324 Pairs Comparison Ex.

MOTIVATION THEORY & ITS PROBLEMS

Common problems are the failure of motivators' to make allowances for:-

- TASK needs,
- GROUP needs,
- INDIVIDUAL's needs.

TASK NEEDS relating to
- method study,
- job structures,
- technological requirements,
- interdepartmental rivalries.

GROUP NEEDS

There will always be:-
- group pressures,
- union requirements

UNION REQUIREMENTS

which may conflict with
- an individual's needs,
- community needs.

GROUP PRESSURES
- not to be seen as 'a bosses man',
- to conform to group norms & remain 'one of the boys'.

INDIVIDUAL'S NEEDS
- Present needs are affected by future hopes & expectations, eg.
- union's expectations for its members,
- budget politics.

- The effect of imposed budgets & tying rewards to budgets.
- The effect of budget policies on pay negotiations & requirements.
- The effect of high budgets and low results.
- The effect of low budgets and high results.
- The effects of inflation.
- The influence of governmental structures.

Union expectations, as indicated by :-
- attitude towards management,
- attitude towards wage audits,
- pay negotiations
- other negotiations for

Improved :-
- hygiene factors.
- worker ownership,
- worker participation.
- profit sharing schemes.

Concern about :-
- Erosion of differentials,
- Effects of inflation,
- Effects of devaluations.

Problem Analysis

* Problem ownership
* Problem solving

Problem ownership

o single ownership
o multiple ownership

Single ownership

- Desire to take action & ownership of problem.
- At meetings (on agenda) specify for each item.
  - objectives of agenda item
  - problem owner
- Use counselling technique to increase subordinate's awareness of problems

Multiple ownership

- Specify interested parties
- Build solution v. compromise

- if interested parties are NOT specified :-
  - imaginary problems are invented.
- if parties ARE specified :-
  solutions can be built.

Problem solving

o "Client/leader/resources" concept.
o Problem definition.
o Problem discussion.
o Problem solution.

Client/leader/resources

- Client owns problem & must find his own satisfactory solution.
- Leader supervises process.
- Resources are colleagues who provide ideas for the client to build on.

(See 7.22)

Problem definition :- to

- help client to understand his real problem.
- help client to imagine ideal solution.
- help resources to understand background & solutions already considered.

Problem discussion :-

- techniques
- discussion process

Problem solution

- "Go Do...." Develop a solution which the problem owner is enthusiastic about & really intends to implement.

Building solutions v. compromise

- build solution by :-
  - one problem owner develops "satisfactory solution".
  - another problem owner gives "+ve response" to solution & then gives his problems.
  - 2nd problem owner develops satisfactory solution.
  - 1st (or yet another) problem owner gives "+ve response" to solution & then gives his problem.

etc..

Building solutions gives –
"improved solution" built by interested parties.

Compromise gives –
"lowest common solution" acceptable to interested parties.

Techniques

- HEADLINING – headline idea before giving background.
  (helps listener to absorb idea better)
- HOW TO... – suggestions & problems prefaced with "How to...."
  (helps group to build on each others ideas)
- +ve RESPONSE – give 3 reasons why idea liked before giving "problem".
  (helps problem owner to understand & use idea)
- PARAPHRASE – feed back idea in own words.
  (helps to understand & build on idea)
- EXCURSIONS – give ideas from "DIFFERENT CAREER" or "NOVEL IMAGE".
  (helps to avoid habitual thought)
- SHIT DETECTORS – consider how this item & "hidden agendas" are affecting individuals in the group.
- S.T.P. – Specify SITUATION, TARGET then find PROCESS
  (helps group to think positively about change)

Papers

A 655	The S.T.P. model of Problem Analysis
C 417	The PRESIDENT'S SOLUTION
F 72	Problem Definition

Problem Analysis & Decision Making

* Analysing Problem
* Taking Decisions
* Working with People

Analysing Problems

The need for careful problem analysis before embarking on the decision making process

* Recognise problem
* Specify problem
* Collect information
* Identify causes.
* Test causes.

* Problems recognised by deviation from standards :-
  - fixed standards
  - assumed standards
    - historic
    - subjective judgement

* Specify problem by finding & recording
  - what it is & what it isn't
  - where it is & where it isn't
  - when did it occur & when wasn't/isn't it there
  - how big is it & how does it change with time

* Collect information & decide :
  - why the info. is required
  - what info. is required
  - where/how can info. be obtained

  consider :
  - accuracy of info. obtained
  - people from whom info. "
    - your effect on them
    - their effect on you
    - their bias & interests

* Decide what problems could have caused this problem
  Use experience - of self
  - of others
  - brainstorming
  - problem trees

* Ascertain whether the cause/causes identified could have accounted for the whole problem.

Decision Making

The need for carefully following the decision making steps if the best line of action is to be followed

* State aims.
* Search for alternatives.
* Evaluate alternatives!
* Assess consequences!
* Select best.

Implementation
Plan change ★
Consider people

State aims :- identify the { essential aims, desireable aims, of the decision

Search for alternatives :-
Identify the alternative ways of meeting the aims of the decision - use morphological analysis; brainstorming; thought trees.

Evaluate alternatives :-
Evaluate quantifiable factors in the alternatives
- financial evaluation - R.O.I/D.C.F./payback/risk analysis
- time evaluation - networks/bar charts
- feasibility evaluation

Assess consequences
to :- employees
- politicians
- environment
- other people

Select best
Take personal decision on best course of action

Working with People

The need to recognise what is going on in the group & identifying ways in which it can be made more effective.

- How does personality affect groups ?
- How is leadership established ?
- How is leadership mdde effective ?
- How can individuals be helped to participate ?
- How was technical expertise handled ?
- How can conflict be handled ?

★ Plan change :-
Schedule what has to be done
- by whom
- when

→ use networks, charts, discussions, meetings, memos, training, reports.

PAPERS :-
A 24 Problem Analysis
A 25 Decision Making

Problem Identification 1

* Recognising the problem
* Specifying the problem

SPECIFY THE PROBLEM

* What is it ? * What isn't it ?
* Where is it ? * Where isn't it ?
* When did it happen ?
* When wasn't it happening ?
* How big is it ?

WHO ?
WHAT ?
WHERE ?
WHEN ?
WHY ?
HOW ?
WHICH ?

SPECIFY THE PROBLEM

- Accurately
- Precisely

RECOGNISE THE PROBLEM

* How are problems recognised ?
* How is performance monitored ?
* How can the right information be produced ?

PROBLEM RECOGNITION

- Deviation from FIXED standards of PLANNED performance.
- Deviation from ASSUMED standards of PREVIOUS performance of self & others.
- Deviation from SUBJECTIVE judgement

Analyse Resources | State Basic Aims | Examine Environment

Alternative plans
Corporate plans
Long-range plans
Short-term plans
- Budgets
- M.B.O.
- Networks

- What jobs do you do ?
- What decisions do you take ?
- What information do you need ?
- How do you display it ?

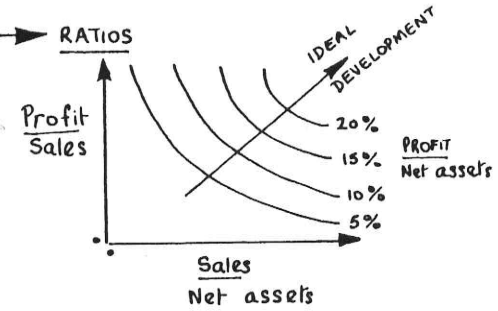
MONITORING PROBLEMS

- Parameters
- Ratios
- Satisfaction

WHOSE SATISFACTION ?

- Customers & clients
- General public
- Staff
- Suppliers

RATIOS



PARAMETERS

- Sales revenue – turnover (new & existing products)
  – price
- Costs – direct expenses (incl. materials)
  – labour – direct + indirect
  – overheads – staff, accomn, fin., services
- Liquidity

PAPERS :-
A31 - NETWORKS
A196 - PROVISION OF MGT. INFO".
A430 - BUSINESS CHARTS
A454 - BARSAC
A537 - FINANCIAL & BUSINESS RATIOS
C109 - FINANCIAL ANALYSIS
C233 - TRAINING RECORDS

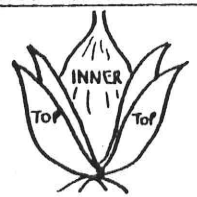
PROBLEM IDENTIFICATION 2

* WHAT PROBLEMS DO YOU HAVE ?
* HOW CAN YOU IDENTIFY THEM ?

WHAT PROBLEMS DO YOU HAVE?

- How deeply have you viewed the problem ?
- Have you examined all the 'pieces' ?
- Have you looked at tangible & intangible needs in the situation ?

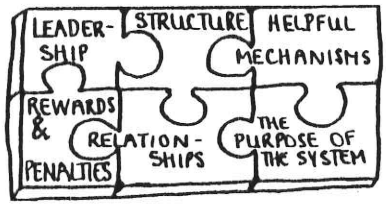
ONION MODEL of a PROBLEM



IDENTIFYING THE PROBLEM

- What is the present situation ?
  - What are my problems ?
  - What are other people's problems ?
  - What are the organ^n's problems ?
- What are the 'targets' ?
  - What do I want to achieve ?
  - What do others want to achieve ?
  - What does the organ^n want ?
- Consider :-
  - Performance needs such as PAY; OUTPUT; ACHIEVEMENT & EFFECTIVE USE of TIME.
  - Personal needs such as SAFETY; COMFORT; PERSONAL PROGRESSION; INVOLVEMENT; CONTROL; NEED for STRUCTURE & CLEAR OBJECTIVES; FRIENDSHIP; PLEASURE; WINNING; RECOGNITION & LEADERSHIP.
  - Norms, encouraging unproductive behaviour & discouraging productive behaviour.

JIGSAW - PUZZLE MODEL of a PROBLEM



THE PARTS OF THE SYSTEM

LEADERSHIP - who is responsible ?
- who wants to do anything ?
- where is their energy to do anything ?

STRUCTURE - how is the system organised ?
- how is the info^n communicated ?
  - up & down,
  - consider management style.
- how is the work divided ?

HELPFUL MECHANISMS - control data;
- meetings ; consultation ;
- informal discussion.

REWARDS & PENALTIES
- what are people rewarded for ?
- what are they penalised for ?
- how does this affect people ?

THE PURPOSE OF THE SYSTEM
- what is the system trying to achieve?
- what inputs does it get ?
- what outputs does it give ?
  (what is demanded / wanted / expected ? consider quality, reliability & time.)

RELATIONSHIPS
- what problems / conflicts / concerns ?
- what formal & informal hierarchy ?
- what politics ? - what norms ?
- how is conflict dealt with ?

ICEBERG MODEL of a PROBLEM

"People's reactions to a situation are affected at least as much by intangible needs.....
- Political factors (power; status & the need for control).
- Personal factors (comfort; recognition; hopes; fears; perceptions ; beliefs)

..... as they are by their tangible needs for money; goods & services."

Layers of a Problem.

TOP LAYER - business problem or 'problem as presented'.
- problem expressed in a 'tangible' way e.g.
  - costs
  - quality etc.
- symptoms, not causes, seen.
- expressed futility of doing anything "...ain't it awful."

SECOND LAYER - other people's contribution or blaming others. Only seeing how others have contributed to the problem.
- I am the victim.

INNER LAYERS - my own contribution or what can I do ?
- what role am I playing in the problem ?
- am I helping the solution ?
- am I hindering the solution?

PAPERS :-
A 24 - PROBLEM ANALYSIS
A 707 - LAYERS OF A PROBLEM
A 715 - THE 6-BOX ORGANISATIONAL MODEL
F 100 - SITUATION SPECIFICATION
F 101 - TARGET SPECIFICATION

GROUP PROBLEM SOLVING

* IDENTIFY PROBLEMS → Agree a description of the problem. → e.g. 'How to raise company morale'.

* IDENTIFY CAUSES of the problem. → Each member writes down causes on a card. One cause/card → e.g. Poor leadership, Poor pay, Poor prospects, etc. (Use brainstorming or problem trees.)

Shuffle & redistribute cards. Read. Rewrite if not clear.

Group cards into "Mountains". Name each mountain & write onto larger card. → Fewer than 10 groups. → Name to be agreed & represent the essence & meaning of that 'mountain'.

Lay out cards on white sheet. Agree lay out. Encircle 'heaps in coloured 'frames' → FRAMES: Blue = Large group. Green = Med. sized gp. Red = Small group.

* RECORD RELATIONSHIPS → Record relationships,
- Cause & effect.
- Interdependence.
- Contradiction.
- Connection/close-relations.

CAUSE → EFFECT/RESULT
CAUSE & RESULT ↔ CAUSE & RESULT
CAUSE & RESULT >< CAUSE & RESULT
CAUSE & RESULT — CAUSE & RESULT

* SEARCH for ALTERNATIVE SOLUTIONS → Each member writes solutions to '1 mountain' at a time. 1/card → e.g. "How to regrade...." "How to involve...." "How to delegate...." etc. Use brainstorming technique.

Shuffle & redistribute cards. Read. Rewrite if not clear.

When all 'mountains' have been dealt with, group solution cards into 'Lakes'. Name, agree & label lakes. → Fewer than 10 'lakes'. → Name to be agreed & represent the essence & meaning of that 'lake'

* SELECT PRACTICAL SOLUTIONS → Agree what action should now be taken. Consider each 'mountain' & each 'lake'. Consider - essential aims & - desirable aims

* IMPLEMENT SOLUTIONS → What needs to be done? What steps be taken?
- by whom?
- when?
- who else is involved?

PAPERS:-
A2 - EFFECTIVE THINKING
A24 - PROBLEM ANALYSIS
A25 - DECISION MAKING
A636 - CREATIVITY & INNOVATION
A639 - CREATIVE THINKING & BRAINSTORMING

THE PROBLEM SOLVING PROCESS

RECOGNISE THE PRESENT SITUATION

NAME THE PROBLEM
- Agree a description of the problem.
- Start with "How To..." or "How CAN I...?"
- Use one sentence. Use F72 to clarify problem.

SEARCH FOR CAUSES
- What is the present situation & what caused problem? See S 252 b :- Problem Identification - See F100
Draw a problem tree

DESCRIBE THE SITUATION
- Describe the present situation with tangible & intangible needs to clarify your thoughts.
- Use oral description & diagram.

PAPERS :- F72 & F100.

IDENTIFY YOUR TARGETS

IDENTIFY YOUR TARGETS
- What do you, others & the organ: want to achieve? See S 252b :- Problem Identification. See F101.
See S :- Brainstorming

DESCRIBE YOUR TARGETS
- Describe the targets with tangible & intangible needs to clarify your thoughts.
- Use oral description & diagram.

DEFINE TARGET IMPORTANCE
- Define the importance of each target. Is it essential ? = MUST Should I get it ? = Should
Is it nice to get = NICE Could I not omit it ?= could

PAPERS :- F101.

SEARCH FOR ALTERNATIVE WAYS OF ACHIEVING THEM

BRAIN-STORM PROCESSES
- What are all the ways of moving from present to target situation ? (Both PRACTICAL & IMPRACTICAL)
See S 251 e :- Brainstorming

DESCRIBE THE PROCESSES
- Bring together all similar ideas into categories.
- Describe the processes to clarify your thoughts.
- Use oral description & diagram.

SELECT PRACTICAL PROCESSES
- Consider each category in turn & identify any "Go Do ....." or practical process you would be prepared or motivated to try.

EVALUATE THE PROCESSES & SELECT THE BEST

FINANCIAL EVALUATION
- How much would each "Go Do..." cost to buy/ instal / Run ? Consider payback; R.O.I; D.C.F.; risk analysis & cost-benefit analysis. See Pro-Forma

RANK UNQUANTIFIABLE FACTORS
- How can these factors be ranked ?
- Use weighting systems & pairs comparison.
See A 25 ; A 362 ; A 480 & A 585.

SELECT THE BEST
- It is your job to select the best. Consider the evaluation & ranking ; other people's views; where the energy is & your "gut" feelings.

PAPERS :- A 25 ; A 362 ; A 480 ; A 585

IMPLEMENT YOUR DECISION

PLAN
- How should the solution be implemented ?
- Gather support - involve staff - listen.
- Plan time & cash flow See A 31 - NETWORKS

IMPLEMENT
- How can you get the job done better?
- Consider leadership ; communication & people needs as individuals & group members.

MONITOR
- Verify that the desired results are obtained.
- Use networks & barcharts. Change methods if needed - change goal if appropriate.

PAPERS :- A 31

TAKING ACTION

* Power to act
* Action responsibility
* Wanting to take action

Power to Act

- Direct & in-direct power
- Hierarcy effect on power
- Constraints on power

Direct & Indirect Power

- Direct power – power to do the thing required oneself
  – power from ability to act
- Indirect power – power to persuade/coerce/convince others
  – power from words

Hierarchy Effect on Power

- The higher a manager moves, the more indirect his power becomes.
- The power held at different levels varies from :-
  being constrained (lower levels) → constraining (higher levels)

Constraints on Power

- Real & imagined constraints – if the constraints are examined frequently they are found to be imagined.
- "I wish I could..." v. "I wish they would..."

"I wish for direct power to act"

"I wish for indirect power to act."

"I wish to persuade them"

Action Responsibility

- when each person is responsible for what he/she does.
- people who own the problem must own the solution.
- motivation is 'wanting to do it', so management can only create the atmosphere in which people will be motivated.

- Problem ownership
- Marketing ideas

Check out "Is help required?"
- does he recognise the problem?
- does he want help solving it?

Ideas v. Solutions
- idea → possible action by problem owner
- solution → planned action which appeals to problem owner

Selling ideas v. marketing ideas
- selling ideas ⇒ fixed ideas
- marketing ideas ⇒ ideas changed by client

Win : win v. lose : lose
win : win ⇒ benefits all round ∴ action
win : lose ⇒ one side benefits

Problem Ownership

People are only motivated to take action to solve a problem if :-
- they recognise they own the problem,
- they own the solution.

People are frequently in a position where :-
- they don't recognise problems seen by others,
- they don't want to recognise them, & are not open to suggestions to solve them.

People are sometimes able to recognise a problem but are not looking for ideas to solve it so :-
- ideas can be rejected forcibly,
- a 'moan' discussion is required.

Problems can sometimes be successfully discussed at two levels – a safe assumed level,
– a hidden real level.

PROBLEM SOLVING & DECISION TAKING

PROCESS (Detail)
- Brainstorm.
- Involvement.
- Commitment

PROCESS (Overall)
- Name the problem
- Describe the situation
- Identify the target
- Select the process

COMMITMENT
- Each person decides on what they should do.
- Each person is involved in overall solution.

INVOLVEMENT
- Agree problem definition.
- Brainstorm - write cards.
- Swop cards & see other people's ideas.
- Agree groupings.
- Agree names of groups.
- Agree best solutions.

BRAINSTORM
- Production of many ideas through building on other people's ideas.
- Suspension of evaluation.
- Write ideas on cards "How to...."
- Swop idea-cards from group to group to read.
- Group cards into - lakes, clouds & mountains.
- Give groups a name reflecting their essence.
- Pin up "GROUPS" of ideas.
- Record relationships with lines between
  - cause → effect
  - interdependence ←→
  - contradiction >< (mutually exclusive)
  - connection ●—● (close relationships)

NAME THE PROBLEM
- Agree a description of the problem & opportunity presented. (one sentence)

DESCRIBE THE SITUATION
- Features
  - causes of situation.
  - resources available, (people, money, eqpt).
  - relationships inside system.
  - purpose of the system.
  - structure of the system.
- 'Facilitating' forces
  - enthusiasm.
  - power to act available?
  - helpful mechanisms.
  - leadership.
  - 'rewards' mechanisms.
- 'Impeding' forces
  - reluctance.
  - hindering mechanisms.
  - 'penalty' mechanisms

DESCRIBE THE SITUATION
- 'Brainstorm' ideas on the situation (write onto cards).
- Group cards into 'lakes'.
- Give name to each 'lake' reflecting its essence.
- Record relationships between 'lakes'.

IDENTIFY THE TARGETS
- Essential & desirable targets.
- Financial, time quantity & other quantifiable targets
- Subjective, emotional & other non-quantifiable targets (eg. winning, pleasure, safety, comfort, learning, etc)

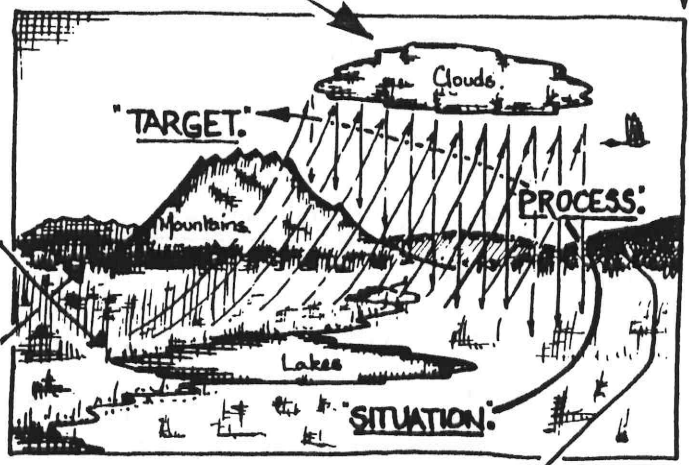
IDENTIFY THE TARGETS
- Brainstorm ideas on the targets. (write them onto cards)
- Identify essential & desirable targets
- Group cards into 'mountains'.
- Give name to each 'mountain' reflecting its essence.
- Record relationships between mountains.

SELECT THE PROCESS
- Brainstorm "How to ..." get from each lake to each mountain.
- Group ideas into "clouds".
- Generate "Go do....."s from each 'cloud.'
- Select best practical solutions. (Consider objectives & personal enthusiasm)

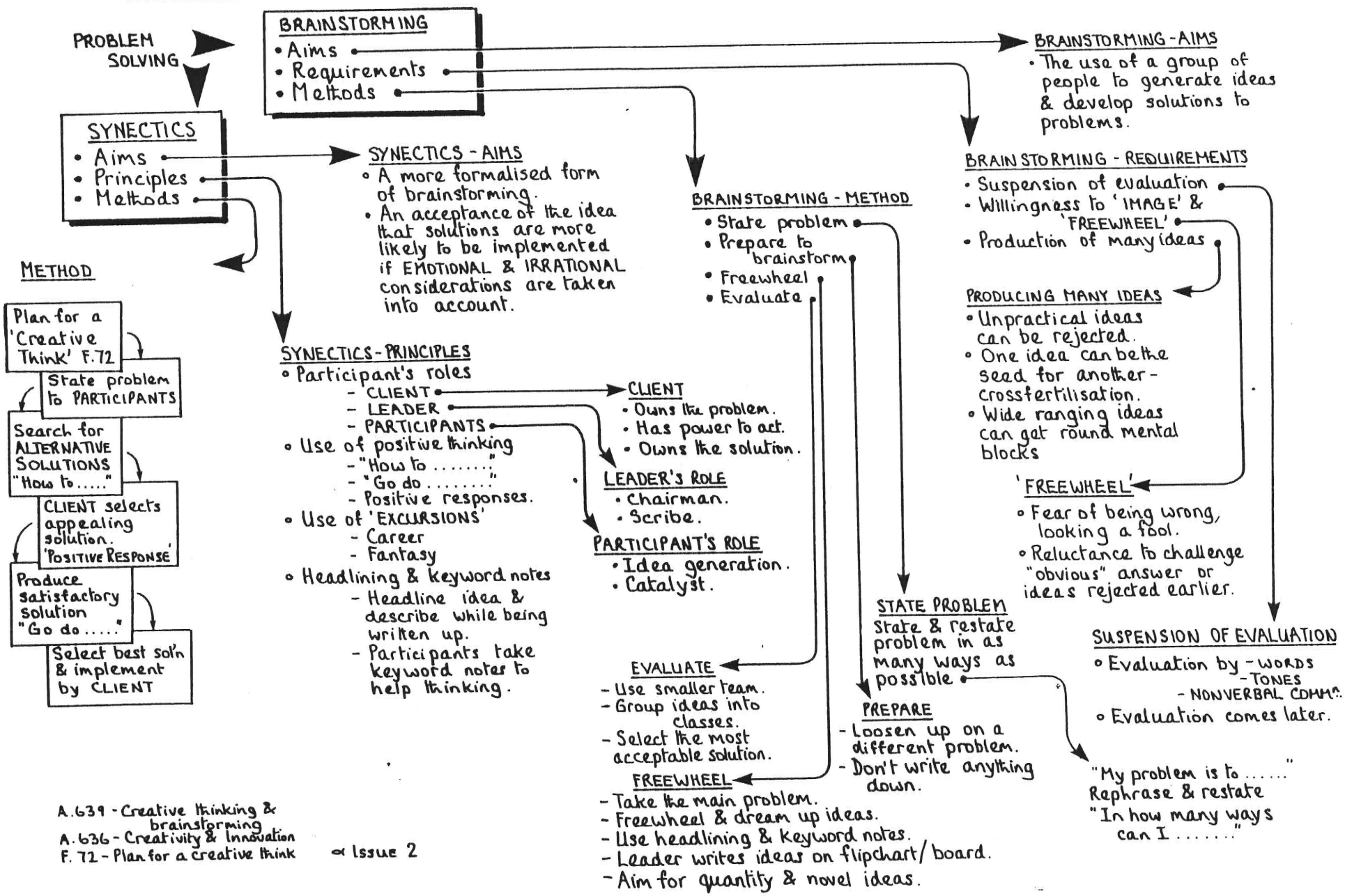
SELECT THE PROCESS
- Search for ALTERNATIVE WAYS
- Select the BEST way
  - evaluate,
  - assess consequences.
- Plan CHANGE.
- Consider PEOPLE.

PAPERS :-

A1	- EFFECTIVE THINKING
A24	- PROBLEM ANALYSIS
A25	- DECISION MAKING
A636	- CREATIVITY & INNOVATION
A639	- CREATIVE THINKING & BRAINSTORMING
A623	- DEALING WITH DIFFERENCES



BRAINSTORMING & SYNECTICS

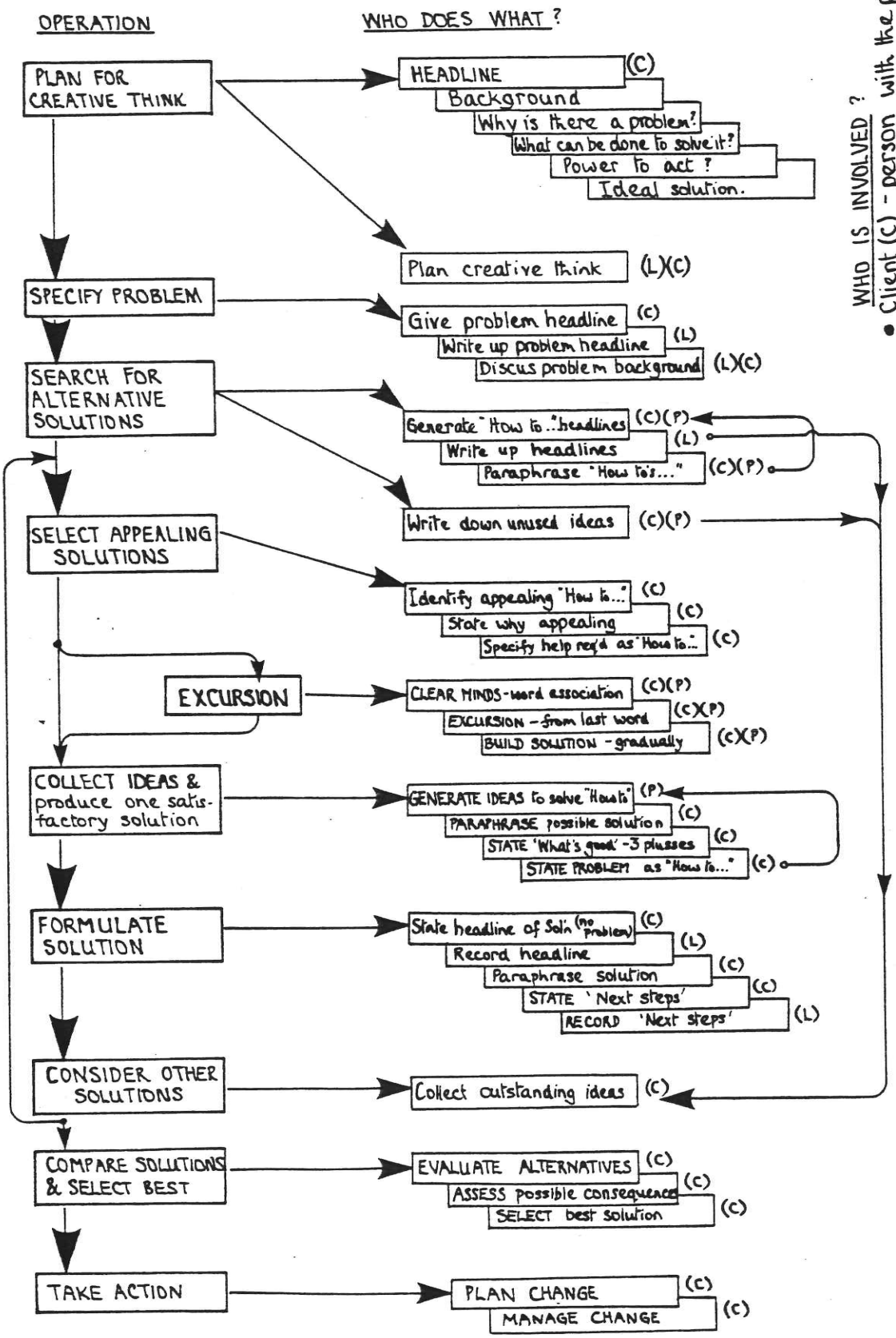


A.639 - Creative thinking & brainstorming
A.636 - Creativity & Innovation
F. 72 - Plan for a creative think

∝ Issue 2

SYNECTICS

A CREATIVE THINKING / PROBLEM SOLVING PROCESS

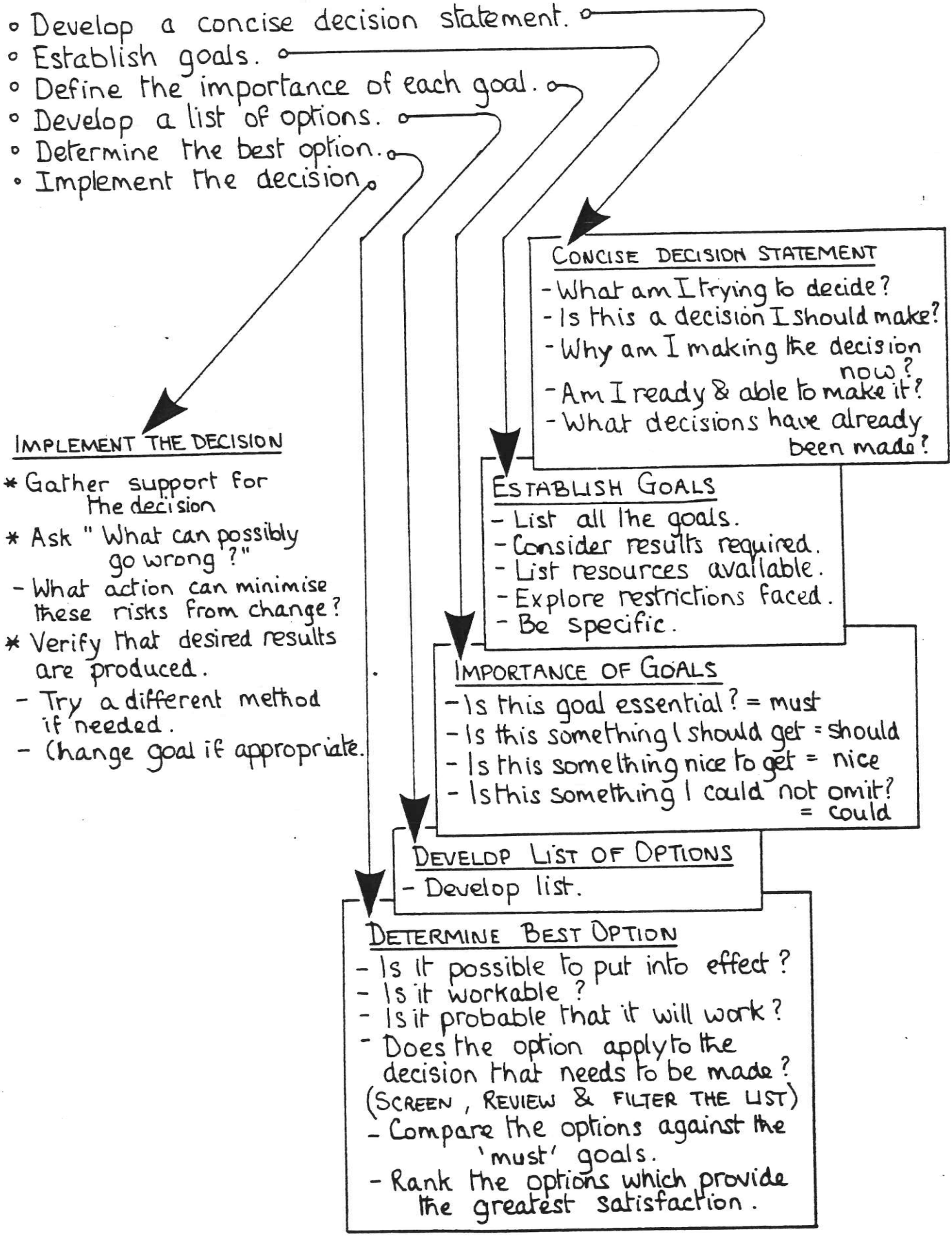


WHO IS INVOLVED ?

- Client (C) - person with the problem, which has no routine solution.
- Leader (L) - Consultant & group leader.
- Participants (P) - Group members to assist with idea generation.

DECISION MAKING PROCESS (K.J. METHOD)

- Develop a concise decision statement.
- Establish goals.
- Define the importance of each goal.
- Develop a list of options.
- Determine the best option.
- Implement the decision



PROBLEM IDENTIFICATION 3

- ✳ LAYERING - ONION MODEL
- ✳ THE SYSTEM - '6 BOX MODEL'
- ✳ PROBLEM SYMPTOMS
- ✳ INFORMATION COLLECTION

LAYERING 'ONION MODEL'

- Layers of a problem. (see Outline 7.16)
- Layers of questions

LAYERS OF QUESTIONS

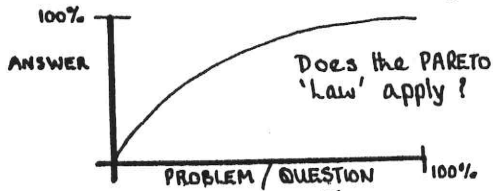
- Top Layer.... business problem aspects.
- Next Layer... what do you see others doing to contribute to the problem?
- Third Layer... what role are you playing, helping or hindering solution?

INFORMATION COLLECTION

- Readiness to solve the problem
- Force field
- Questions
- Completeness

COMPLETENESS

- Can you ever give the whole answer or solve the problem completely?
- Make do with 'satisficing'?



QUESTIONS

- Use Kipling's '7 honest serving men' (Who; What; Where; When; Which; Why & How)
- What is wrong?
- Where is it wrong?
- When did it occur?
- How big is it?

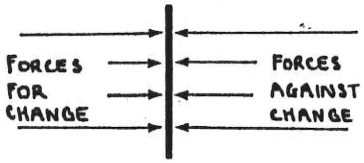
etc.

READINESS

- Where is there energy to want to do something; to seek or receive help?

FORCE FIELD

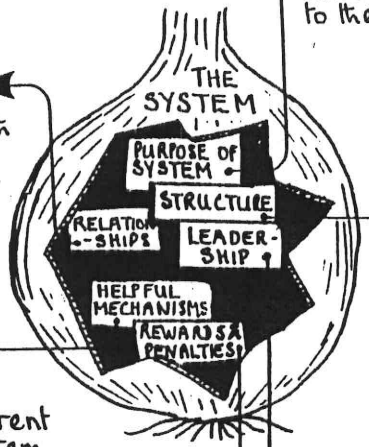
- The views, opinions & attitudes of others are FORCES in the system.
- Change is successful if the forces opposed to it are reduced enough.



PROBLEM SYMPTOMS

- Deviations from fixed standards of planned performance?
- Failure to reach set business ratios?
- Subjective judgements?
  - dissatisfaction.
  - frustration & tension.

THE SYSTEM - '6 BOX MODEL'



PURPOSE OF THE SYSTEM

- What is the system trying to achieve?
- What INPUTS from environment
  - what wants does it have?
  - what demands are made?
  - what expectations has it?
- What OUTPUTS are provided to the environment?

RELATIONSHIPS

- How do they deal with conflict?
- What hierarchies are there?
  - formal
  - informal
- What norms exist?

STRUCTURE

- How is the work divided?
- How is the system organised?
- What communication styles are used?

HELPFUL MECHANISMS

- How are the different parts of the system integrated?
  - Control systems.
  - Consultation / meetings.
  - Management data.
  - etc.

REWARDS & PENALTIES

- What are people rewarded for?
- For what are they penalised?
- What control system operates?

LEADERSHIP

- Who is responsible for bringing together all aspects of the system?
- How are overall problems of the system taken care of?

PROBLEM SOLVING

* Identify the background to the problem
* Identify the problem
* Solve the problem

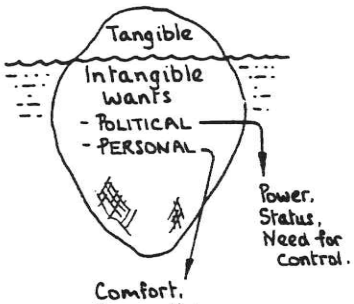
PROBLEM BACKGROUND

- How deeply have you looked into it ?
- Have you considered all the pieces of it ?
- Have you looked into the tangible & intangible wants ?

IDENTIFY THE PROBLEM

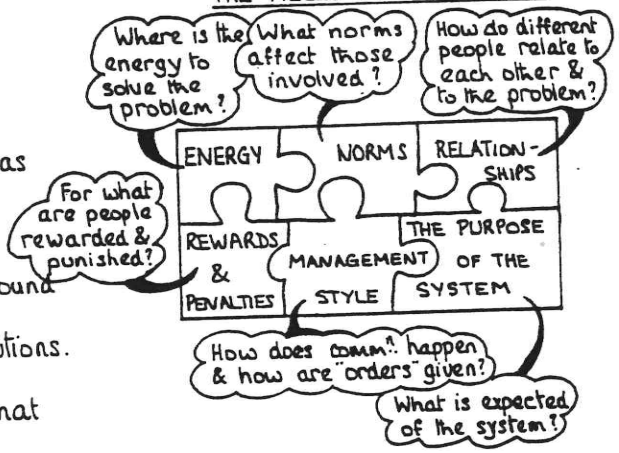
- What is the present situation ?
  - what are my problems ?
  - what are other people's problems?
  - what are the organisation's problems ?
- What are the targets ?
  - what do I want ?
  - what do others want ?
  - what does the organisation want ?
- Consider :-
  - Performance needs - pay ; output ; achievement & effective use of time.
  - Personal needs - safety; comfort; personal progress ; involvement ; control ; need for structure ; clear objectives ; friends ; winning ; recognition ; leadership.
- Norms :-
  - Encouraging or discouraging; productive & unproductive behaviour.

THE WANTS IN A PROBLEM



"PEOPLE'S REACTIONS TO A SITUATION ARE AFFECTED AS LEAST AS MUCH BY THE INTANGIBLE WANTS OF THE SITUATION AS THEY ARE BY THE TANGIBLE NEEDS FOR MONEY GOODS & SERVICES."

THE PIECES OF THE PROBLEM



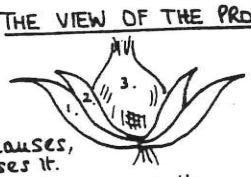
SOLVE THE PROBLEM

- Produce ideas.
  - Brainstorm, where impractical ideas can generate practical solutions.
  - Ideas don't have to be solutions.
- Evolve practical processes.
  - What possible processes can be found to solve the problem.
  - Processes don't have to be solutions.
- Agree solution.
  - Problem owner must decide what he will go and do.

Problems cannot be solved satisfactorily if :-

- People who are involved cannot participate.
- The problem owner does not own the solution.

THE VIEW OF THE PROBLEM



1. Symptoms not causes, the system causes it.
2. I am the victim - others cause it.
3. What role am I playing ?
   - Am I helping the solution ?
   - Am I hindering the solution ?

GROUP BEHAVIOUR

* Fears of people in groups.
* Needs of people in groups.
* Actions of people in groups.
* Group norms.
* Effects of conflict on groups.

FEARS OF PEOPLE IN GROUPS

- Individual group members fear:-
  - Rejection.
  - Ridicule.
  - Being influenced.

NEEDS OF PEOPLE IN GROUPS

- Individual group members need:-
  - Recognition.
  - an Identity.
  - to feel that they can influence the group.

FEARS OF PEOPLE IN GROUPS

Group fears & needs develop with time.

- FIRST STAGE = Formal & insecure. Acceptance of procedures roles & seating positions. Talk to briefs, danger from pushing & change.
- SECOND STAGE = Secure & less formal. Reaction against roles & previous leaders. Move from briefs.
- THIRD STAGE = Efficient working. Knowledge of abilities; Trust & use of subgroups.

ACTIONS OF PEOPLE IN GROUPS

- Transactions in the group can be classified as:-
  - Maintenance
  - Soft Response
  - Hard Response
  - Withdrawal

MAINTENANCE TRANSACTIONS

- Initiating ideas.
- Clarifying ideas.
- Summarising agreements
- Harmonising.
- Compromising.
- Encouraging & bringing-in.
- Giving structure.

SOFT RESPONSE

- Forming alliances.
- Building the group.

HARD RESPONSE

- Bulldozing.
- Damaging group cohesion.
- Shutting out.

WITHDRAWAL

- Result of frustration.

EFFECT OF CONFLICT ON GROUPS

- During conflict.
- Following conflict.
- Reducing conflict.
- Advantages of conflict

ADVANTAGES OF CONFLICT

- Ideas generated (How can we beat them?)
- Ideas tested & modified.
- Teams brought together inside groups.
- Individuals value one another.

REDUCING CONFLICT

- Find an over-riding goal.
- Intergroup maintenance.
- Avoid WIN:LOSE situations.
- Rotate group members.

DURING CONFLICT

- INSIDE Group
  - Sees best in self & worst in others.
  - More task oriented & demands conformity.
  - Greater loyalty & territorial interest.
- BETWEEN Groups
  - Interaction & comm^{n} decreases.
  - Hostility increases.
  - Stereotypes formed of hostile gp.
  - Emphasis on strategy v problem solving

FOLLOWING CONFLICT

- The WINNERS - more cohesive; complacent; co-operative; & "playful". Less tension & work.
- The LOSERS - more tension. Group splinters; fights; reorganises; blames leader.

GROUP NORMS.

- Definition
- How are norms shown?
- What is the effect of norms?
- How are norms caused?

DEFINITION

- An assumption/ expectation held by group members concerning what kind of behaviour is:- right/wrong; good/bad; allowed/not allowed appropriate/inappropriate

HOW ARE NORMS SHOWN?

- They influence behaviour
- What behaviour gets:-
  - reinforced/rewarded.
  - discouraged/penalised.

INFLUENCE BEHAVIOUR by:- Language; dress; secrecy; openness; productivity; competitiveness; etc.

HOW ARE NORMS CAUSED?

- From modelling behaviour of prestigious member.
- By new members seeking acceptance.
- By accidental discovery of advantageous behaviour.

THE EFFECT OF NORMS?

- Provides order & inhibits chaos.
- Provides standards to control group behaviour.
- Small gp. identity in large org^{n}.
- Counteracts anonymity.
- Encourages WE:THEY attitudes.
- Enhances security, intimacy, familiarity.

PAPERS:-
A315 - GROUPS AT WORK.
A343 - GROUP PSYCHOLOGY.
A444 - WHAT TO OBSERVE IN GROUPS.
A458 - UNDERSTANDING GROUP BEHAVIOUR.
A598 - INTERGROUP BEHAVIOUR.
A623 - DEALING WITH DIFFERENCES.

FILMS:-
BLOWING HOT & COLD.
ONE SIDED TRIANGLE

ISSUE 2

GROUP BEHAVIOUR OBSERVATION SHEET

- ACTIONS – what are the effects of others on me?
- REACTIONS – what are my reactions to them & the task?

REACTIONS

- Useful reactions,
  - careful problem solving.
  - producing creative ideas.
  - planning & establishing priorities
- Damaging reactions,
  - becoming DEVIOUS, INFLEXIBLE, & opting out.
  - trying to change your ROLE in the group

(see S213 g Vol 1)

Damaging reactions

- What can you do to avoid,
  - breakdown of trust?
  - individuals becoming inflexible?
  - individuals opting out?
  - team breaking down?
  - conflict?
- Should you avoid conflict?

Useful reactions

- What can you do to,
  - build a team?
  - solve problems better?
  - be more creative?
  - work together?

ACTIONS

- Effect of Leader
- Effect of colleagues
- Effect of bureaucracy
- Effect of loss of trust
- Effect of influencing styles

Effect of LEADER.

- Autocratic leader
- Participative leader
- Task v. People orientation

Leadership

What is the leader's role?

Effect of Colleagues.

- How do you encourage?
- How do you repress?

Effect of bureaucracy/rules.

- Effect of formal rules.
- Effect of assumed rules & frustration.
- Effect of moral code.
- Effect of drawing stereotypes

Effect of influencing styles.

- Effect of PUSH styles,
  - threats & bribes,
  - assertive persuasion.
- Effect of PULL styles,
  - common goals.

Styles

- Which style do you use?
- How do you react to the different styles?

(see S.213 d. Vol 1)

Effect of loss of trust.

- Effect of conflict within my group.
- Effect of inter-group conflict.
- Effect of cheating by others.

Trust

- How can you avoid loss of trust?
- How can you rebuild trust?

Rules

- How can you free yourself to get things done?
- What effect will this freedom have?

PAPERS

A 315 Groups at Work.
A 343 Group Psychology.
A 444 What to observe in groups.
A 458 Understanding Gp behaviour
A 598 Inter-group behaviour.

GROUP NORMS

* Definition of NORMS
* Evolution of norms
* Changing norms
* The value of norms

DEFINITION

- A GROUP NORM is an assumption or expectation held by group members concerning what kind of behaviour is right/wrong; good/bad; allowed/not allowed; appropriate/not appropriate.

TYPICAL NORM STATEMENTS

- "Around here, we always....."
- "It doesn't do to....."
- "We never....."
- "When that happens we....."

IDENTIFYING NORMS

By observation, interview or question you discover.....
- behaviour which gets reinforced or rewarded.
- behaviour which gets discouraged or penalised.

Norms are substantive aspects of the job. New group members are alert to signals of acceptance or rejection as they seek to clarify expectations. They find them in formal & informal contacts.

EVOLUTION OF NORMS:- they may evolve through ....

- modelling behaviour on another 'prestigious' group;
- accidental discovery of advantageous behaviour;
- witnessing repeated acts;
- unintended consequences of formal decisions;
- a long period of time → Become anachronistic - original purpose gone.

CHANGING NORMS:- they are resistant to change so ....

- Get group consensus to change; → Management's behaviour unlikely to have enough influence to change norms.
- Generate support for change; → Individual changes are ineffective.
- Address as many factors as possible

THE 'VALUE' OF NORMS

- Counteracts anonymity. → enhances security; intimacy; familiarity.
- Supports small-group identity.
- Are legitimate to group members → not necessarily pro- or anti-management.
- May or may not support organisation's formal goals.
- Provides order. → predictability desireable, avoids chaos.
- Provides standards. → often implicit. → Enables the group to evaluate & control group behaviour.
- Influences behaviour → language; dress; openness/secrecy; competitiveness; productivity.
- Embodies the informal 'shadow' organisation → expresses unwritten, sometimes unspoken rules. → May encourage 'we-they' attitudes.

Issue 2

A 315 - Groups at work.
A 343 - Group psychology.
A 444 - What to observe in a group.
A 458 - Understanding gp. behaviour

INFORMAL GROUPS & ORGANISATIONS

* Why do people form groups ?
* How groups become organisations
* Supervisors of groups.

GROUPS

- Definition
- Types of group
- Group norms.
- Power structure
- Group reaction
- Crowd behaviour

GROUPS – DEFINITION

- A group is a number of PEOPLE or THINGS near together or belonging or classed together.

TYPES OF GROUPS

- Primary & Secondary groups.
- Formal & Informal groups.
- Permanent & Temporary groups.

GROUP NORMS

- A SOCIAL NORM is :- a behavioural expectation shared by group members against which the validity of perceptions is judged & the appropriateness of feelings & behaviour is evaluated.
- A social norm pressurises people to conform.
- Groups provide comfort & aid to their members.

POWER STRUCTURE

- Formal power structure (– the official management structure)
- Informal power structure (– this gives PRESTIGE on the basis of conformity to group norms)

If the gp. concentrates on	it gives prestige for :-
→ Task	Productivity & Helpfulness.
→ Social Relationships	being companionable.
→ Individual Attitudes	the highest attitude.

GROUP REACTION

- Opposition & cooperation frequently occur, not as reactions of individual workers, but as collective reactions of workers through groups.
- Informal social groups in industry & at work are very important.
- MAYO suggests :-
  1. Workers are activated by the logic of sentiment.
  2. Management are activated by the logic of cost and efficiency.

CROWD BEHAVIOUR :-

- Behaviour in social situations in which a number of individuals or groups actively participate & react to one another.

↓

Usually motivated by some issue, threat or crisis which is a common concern.

BECOMING AN ORGANISATION

- Definition.
- Group structures.
- Roles.
- Role conflicts.

DEFINITION

- When a number of groups come together for a similar purpose they constitute an organisation.
- Rules become formalised.
- Leadership & other roles are established.

GROUP STRUCTURES

- For task performance, certain processes occur & structures develop :-
  - a communication structure.
  - a power structure.
  - a group identity develops.

ROLES

- Each worker, at home, has a role and may be the central (focal) person within a set of persons eg. family, friends & club. These constitute his role-set.
- Similarly, at work, he has another role set of colleagues, associates, etc. They have role expectations of him by virtue of his job in the organ?
- Every role has two parts :-
  PRESCRIPTIVE – you must / must not do
  DISCRETIONARY – where innovation is possible.

ROLE CONFLICTS

- The product of differing role demands from within & outside the organisation.
- Similarly from differing role expectations from different members of one's role set eg. line-superior & staff-superior.
- Similarly from incompatible or competing behavioural demands

DEFENSIVE MANEUVRES

- Scapegoating.
- Deprecation & rejection.
- Differential involvement.
- Compromise.
- Confrontation.
- Abrogation of the role set
- Distancing or total withdrawal.

SUPERVISORS OF GROUPS

- Leadership is a role or function of the group.
- Central aspect of L'ship is influence

Production-centred supervisors,
- tend towards authoritarian influences.

Employee-centred supervisors
- devolve responsibility for task onto workers.

↓

Leaders of more effective groups maintain greater psychological/emotional distance from subordinates

ISSUE 2

COMMUNICATING

* Atmosphere for Effective Communication.
* Transmitting information.
* Receiving information.

ATMOSPHERE for effective communication - consider...
- The time & place.
- The motivation.
- Your objectivity.

TIME & PLACE
- Unhurried.
- Uninterrupted / quiet.
- Wanting ideas.

MOTIVATING
- Inspire confidence & liking (be prepared to admit lack of knowledge)
- Be interested in their problems.
- Consider their perception of the effects of any change.
- Consider your effect upon the listeners - enthusiasm & interest,
  - note taking & 'managing'

OBJECTIVITY
- Plan for the interview,
  - what is required ?
  - who is required ?
  - what time is available ?
- Return to subject following a digression.
- Consider the effect of your ATTITUDE on the listeners.

TRANSMITTING INFO^{N}
Decide .....
- Why do you want to communicate ?
- What will the listener expect from it ?
- What points do you want to put over?
- How can these points best be put over?

RECEIVING INFORMATION
- Listening effectively
- Avoiding listening

WHY DO YOU WANT TO COMMUNICATE ?
- To persuade / transmit ideas
- To negotiate / change ideas.
- To learn / get ideas.
- To amuse / impress.

WHAT WILL THE LISTENER EXPECT ?
- WIN : WIN / WIN : LOSE
- Sell the benefits if you want them to listen.

WHAT POINTS DO YOU WANT TO PUT OVER ?
- Plan the logic.
- Explain the logic.
- Observe the reaction.
- Be flexible - with time; with content.

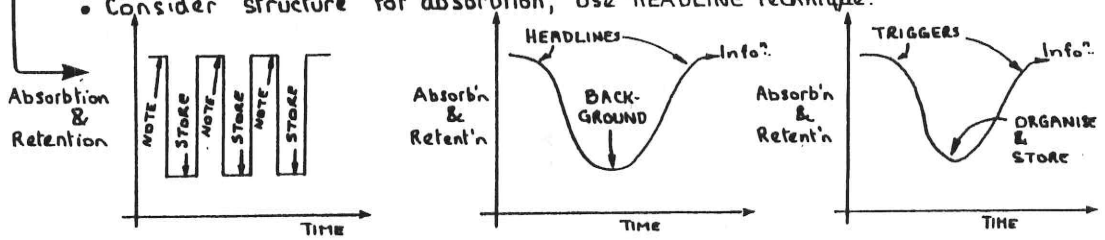
PUTTING POINTS OVER
- Consider how people absorb information &
  - allow enough time,
  - use visual aids,
  - introduce ides, give the ideas & summarise.
- Consider using aids
  - visuals, C.C.T.V., films, handouts, models, etc.
  - discussions, exercises, games, role-play, etc.

'AVOIDING'
- You 'avoid' listening
  - to bad news,
  - to ideas which contradict your own preconceptions,
  - to ideas when you don't want them,
  - to ideas from a 'rejected' communicator.
- 'Avoiding' is indicated by - argument, interruptions, ridicule.
- 'Avoiding' is countered by - listening to their problems.

LISTENING EFFECTIVELY use :-
- Keyword notes on spider diagrams.
- IN:OUT listening to retain material & generate ideas.
- Paraphrasing - to check ideas.
- Positive response - give 3 ideas in favour before criticising.
- Improve your observation of tones, paralanguage & nonverbal aspects.

PAPERS :-
- A4 - Effective speaking.
- A329 - Listening.
- A349 - Careful speaking & effective listening.
- A364 - Interviewing for information.
- F 27 - Speech assessment form.
- F 37 - Talk planning form.
- F 38 - Talk feedback form.

- Consider structure for absorbtion, use 'HEADLINE' technique.



Issue 1

READING FASTER

* The reading process
* Reading faster

THE READING PROCESS

- IDEA (from author)
- Converted to SYMBOLS (written/printed).
- Symbols RECOGNISED
- And INTERPRETED
- By reader & IDEA STORED.
  (See S 311d - Memorising)

IDEA from AUTHOR

- Concepts
- Ideas
- Opinions
- Facts

SYMBOLS WRITTEN

- Words.
- Numbers.
- Charts.
- Diagrams.
- Pictures.

SYMBOLS RECOGNISED

- Subvocalised (letters recognised)
- Words recognised

SUBVOCALISATION

(The voice in your head)

- Reading aloud taught at school develops tendency to subvocalise when older.
- Reduced/eliminated by forcing oneself to read faster.
- Subvocalisation is necessary to appreciate poetry or prose where the sound of words is important.

RECOGNISING WORDS

- Word recognition is helped by improving one's vocabulary by reading.

INTERPRETATION

- Understanding is proportional to the effort put into reading.
- Reading & understanding must be a positive/conscious act.

STAGES in INTERPRETATION

- Perception.
- Comprehension.
- Association

PERCEPTION

- Translating the symbols.
- Decoding the message.
- Assisted by increasing one's vocabulary.

COMPREHENSION

- Understanding the meaning.
- Putting it into context.
- Reconstructing the writer's concepts or ideas.
  - literal comprehension
  - interpretive comprehension

- What is he actually saying?
- What facts?
- How do they relate?

- Reading between the lines.
- Is she saying what she means?
- Is she saying more than she has written?

ASSOCIATION

- Referring ideas to present knowledge.
- Fusing new ideas & knowledge to old for better comprehension & recall.

READING FASTER

- Eye movements - "FIXATIONS"
- Eye movements - "REGRESSIONS"
- Mental blocks
- Using different speeds
- Practice

"FIXATIONS"

- Slow readers 'fix' on every word, so
  - cut down time on each 'fix' by trying to read faster.
  - 'fix' on verbs & nouns & omit most other words.

"REGRESSIONS" (going back)

- From lazyness, boredom or uncertainty - you re-read text.
  - use a card to cover text after you have read it.

MENTAL BLOCKS

- The belief that you cannot do it.
- Reading faster gives a fuller picture & concentrates the mind on the task. Pace reading with an index e.g. finger tip or pencil.

PRACTICE

- The more you practice the better you become.
- The more you read the better your vocabulary.

USING DIFFERENT SPEEDS

- STUDY READING (50-200 w.p.m.) if > 70% comprehension required.
- SLOW READING (200-300 w.p.m.) inefficient, except for enjoyment of poems & novels.
- RAPID READING (300-800 w.p.m.) 60-70% comprehension - 'fixing' on some words & phrases.
- SKIMMING (600-10,000 w.p.m.) very low comprehension - used to get overall ideas (scanning & sampling) & to locate information

STUDY READING apply SQ_3R

- Survey - skim through material.
- Question - what you want to do & the information you need.
- Read - rapidly once or twice.
- Recall - make keyword notes (see S 314d - Spider diagrams)
- Review - revise from your notes. Have you the information/answers?

SCAN

A random selection of words from the text.

SAMPLE - read only....
First paragraph,
First sentence of each para.,
Last paragraph.

CONSIDER
- The nature of the material.
- The purpose of reading.
- External factors

A630 - EFFECTIVE READING
BOOKS:- 'USE YOUR HEAD' - BUZAN
'GUIDE TO RAPID READING' - IND'L. SOC'Y.

MEMORISING

* LEARNING
* RETAINING (& FORGETTING)
* RECALLING (& RECOGNITION)

LEARNING
"Committing to memory."

RETAINING
"Material stored until needed."

RECALLING
"Retrieval from memory."

LEARNING
- Short; medium & long term memory.
- Factors affecting learning.
- Methods used to improve learning. (See middle)

FACTORS AFFECTING LEARNING
- Meaningfulness of the material.
- Amount of material.
- Motivation & personal interest.
- Age - over 30 yrs - poorer short term memory.

RETAINING
- Repression
  Distressing material repressed, sometimes subconsciously, to eliminate failures or pain.
- Distortion
  Material distorted to fit in with preconceived ideas or biases.

RECALLING
- Recalling is helped by recognition.
- Use 'brainpattern', 'spider diagrams', to assist recall from memory.
- Use notes to recall material accurately.

METHODS USED TO IMPROVE LEARNING
- Meaningfulness. Use:-
  - mnemonics,
  - summaries,
  - colour coding; highlighting; underlining.
  - paragraphing; indentations & spider diagrams.
- Amount of material. Use:-
  - scanning & re-reading.
  - break up numbers into groups of 2 or 3.
  - rest after a time.
  - tackle what you think is realistic quantity.
- Overall
  - review notes after talk.
  - take notes when reading.
  - recall aided by words & visuals.
  - practice = words + visual + doing.

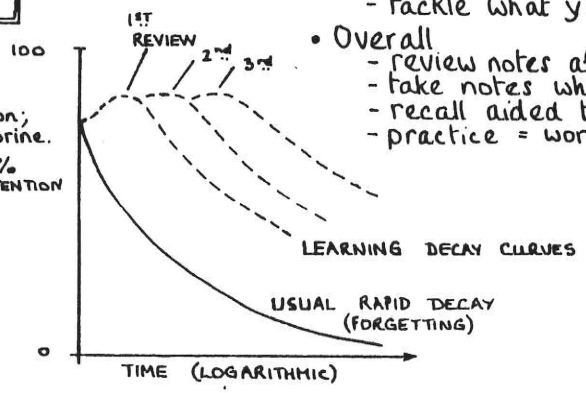
* LISTENING ONLY = ENTERTAINMENT
* LISTENING LINKED WITH THINKING ACTIVITIES ⇒ LEARNING

PAPERS:-
S.16 - SPIDER DIAGRAMS.
A.352 - MEMORY, LEARNING & PSYCHOLOGY OF STUDY.
A.381 - Teaching Older Students
A.459 - Teaching Students to learn & Remember

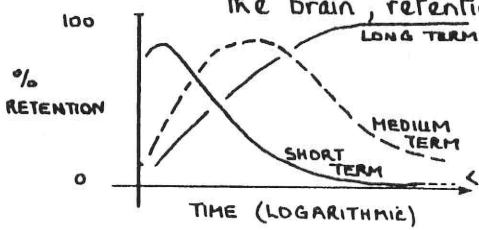
MNEMONICS
Periodic Class^{n} of Elements
Helibebcnof - 2nd Period
Helium; Lithium; Beryllium; Boron; Carbon; Nitrogen; Oxygen; Fluorine.

π = 3.1415926

"How I want a drink alcoholic of course."



SHORT, MEDIUM & LONG TERM MEMORY
- Short-term (few minutes only) - an electrical charge in the brain; decays rapidly.
- Medium-term - produces sodium salts; formed slowly, decays slowly.
- Long-term - produces protein changes in the brain, retention permanent.



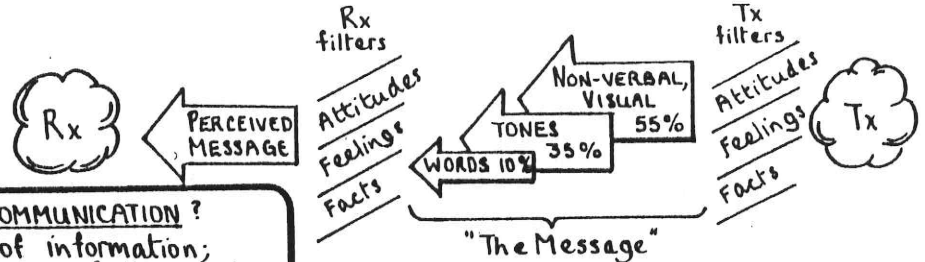
∝ Issue 2

7.32

WHAT IS COMMUNICATION ?

Tx = Transmitter
Rx = Receiver

* WHAT IS COMMUNICATION ?
* WHY IS COMMUNICATION DIFFICULT ?
* CREATE A BETTER ATMOSPHERE FOR COMMUNICATION



WHAT IS COMMUNICATION ?
- Sharing of information; attitudes ; feelings.
- By words / tones / behaviour.
- In order to :-

Gain knowledge / get help / learn.
- Pass on knowledge / give help / teach.
- Change ideas / persuade / negotiate.

CREATE A BETTER ATMOSPHERE
- "Hear" more
- Help the other person
- Get ideas over
- Get consensus

GET CONSENSUS
- Agree the present situation.
  - What are the problems ? (Consider tangible problems & emotional ones.)
- Agree the targets.
  - Where do we want to be ? (Consider tangible, emotional & 'irrational' needs of all people.)
- Think of ideas to achieve the targets.
  - These don't have to be 'solutions'. Impractical ideas can lead to creative solutions.
- Develop alternative solutions.
- Agree what plan to follow.
  - Who wants to do what ?

GET IDEAS OVER
- Listen to what they want. Let them talk,
- Use parables, & let them find their solutions.
- Give ideas, & let them develop their solutions.
- Why do you want to get your ideas over.
  - to out-argue / to win the debate ?
  - to get them to do what you want ?
  - to get something done when the method does not matter.
- Create a WIN : WIN situation.

COMMUNICATION IS DIFFICULT because :-
- The facts are not understood.
  - You may have thought about them but they need time to absorb them.
  - The concept may be difficult to understand. How would you illustrate it ?
  - Facts are hard to accept if they conflict with your preconception.
  - Some words may be misinterpreted or not understood.
  - Listeners are often 'selective' in what they 'hear' & what they reject.
  - The message may be rejeted as biased, unreliable or boring.
- Their feelings are not considered.
  - What do they want to hear ? What impression do I want to give ?
  - Is the speaker frightened ? They may be embarassed ; afraid to look stupid.
  - Does the speaker fear upsetting or embarassing you ?
  - What will happen if I say nothing ?
- Their attitudes may cause rejection.
  - I don't wish to be persuaded, it makes me look weak.
  - I don't want to listen to your ideas - they just confuse mine.
  - I know what you think - its much easier if I have a stereotype.
  - What is expected of me ? What is the 'norm' for this situation ?
  - I am happy as I am and don't want to change.
  - I am not happy in my present situation but I fear change more.

HELP THE OTHER PERSON

Inspire confidence - be liked.
- Admit you don't know - if you don't.
- Say why you like their ideas.
- Be open, be authentic.
- Be interested in their wants / problems & their perceptions of the effects of change.
- Consider your effect upon him/her. (Threatening / managing v. listening / interested)
- Try to understand them, their feelings & attitudes. etc

'HEAR' MORE While in discussion :-
- Paraphrase ; 'say back' in your words.
- Positive response ; say 3 reasons for liking another's idea before rejecting it.
- Observe their behaviour ; to register their attitude & how they feel.

In formal talks :-
- In/out listening & take notes.
- Resume the discussion later, after the talks or meeting ends.

ORGANISATION OF MEETINGS

* TYPES OF MEETING
* PREPARATION FOR MEETINGS
* PROCESS AT THE MEETING
* PROCESS FOLLOWING THE MEETING

TYPES OF MEETING
- Information/Advisory
- Discussion (no action)
- Problem Solving
- Decision-taking/Committee
- Negotiating
- Command

INFORMATION/ADVISORY
- To keep in touch - to involve,
- To co-ordinate,
- To record progress.

DISCUSSION (No action)
- To give therapy - to create or remove conflict,
  - to involve,
  - to get to know
- To punish or reward people.
  - to discipline,
  - to motivate/demotivate.

PROBLEM SOLVING
- To create ideas,
- To institute action.

COMMAND
- To detail action,
- To allocate tasks.

NEGOTIATING
- To agree a contract,
- To find best solution, (usually a compromise)

DECISION-TAKING/COMMITTEE
- To create commitment,
- To share responsibility,
- To improve decision making.
- To initiate action.

PREPARATION
- Planning
- Agenda

PLANNING THE MEETING (See F.75)
- Decide objectives for meeting.
- Subjects to include.
- Persons to involve. Consider availability, authority, knowledge, etc.
- What info"/things are required?
- Book venue; refreshments; car parking space; etc.
- Circulate minutes of last meeting.

PREPARING AN AGENDA (See F.76 & F.77)
- What is the item? Why include it? What outcome is required?
- Are items connected? Is their order important? What time allocation?
- Circulate well before meeting to allow:- arrangements to attend; preparation; etc.
- Agree agenda & timings at meeting.

PROCESS AT MEETING
- Communication process.
- Group behaviour.
- Norms.
- Listening
- Conflict

COMMUNICATION PROCESS
- State proposition
- Give evidence
- Discuss evidence → **DISCUSS**
  - 1-way Comm". for announcements or fixed information
  - 2-way Comm". improves decision commitment; understanding & likelihood of implementation
- State conclusion
- Record & agree action.

NORMS
- What behaviour is expected?
- Is conflict O.K.?
- May anyone express feelings?
- May anyone ask Q's, seek clarification?

GROUP BEHAVIOUR
- Soft response - building; & forming alliances.
- Hard response - shutting out; bulldozing.
- Withdrawal following rejection or frustration.
- Maintenance by encouraging; summarising; initiating; structuring.
- Note need for gp. identity; recognition & influence.
- Note fear of rejection; ridicule; & being influenced.

PROCESS AFTER MEETING
- Summarise conclusions.
- Record minutes, decisions, action plans.
- Progress actions (See F.78)

CONFLICT
- Avoiding it.
- Dealing with it.

DEALING WITH CONFLICT
- Avoiding - avoid sensitive issues.
- Smoothing - discuss issues, but avoid substantive issues.
- Bargaining - compromise & try to optimise people's positions.
- Forcing - use power tactics.
- Confronting - discuss differences openly seeking mutual solution.
- Taking unilateral action - people make up their minds & act as they think is best.

LISTENING
- Make keyword notes/ spider diagrams.
- Paraphrasing.
- Positive response.
- Observe others.
- In:out listening.

AVOIDING CONFLICT
- Find common threat, over-riding goal.
- Perform intergroup maintenance, increase encounters.
- Avoid WIN:LOSE; loss of face; inter group appraisal.

OBSERVING
- Notice: gestures; expressions; eyes; tone of voice, body language.
- Read from them: emotional states; comprehension; agreement; etc.

FILMS:
MEETINGS, BLOODY MEETINGS; ONE-SIDED TRIANGLE; DRAWING; HOT & COLD.
PAPERS: FORMS 75, 76, 77, 78
A113 - THE CONDUCT OF MEETINGS
A168 - SALES MEETINGS
A400 - HOW TO LEAD A DISCUSSION
A625 - MEETINGS CHECKLIST

∝ ISSUE 2

MEETINGS

FILM :- "MEETINGS, BLOODY MEETINGS" - VIDEO ARTS

PAPERS :-
A 113 - The conduct of meetings.
A 168 - Sales meetings.
A 460 - How to lead a discussion.
FORMS - F 75, 76, 77, 78.

* Meetings' procedures
* Types of meeting

STAGES :-
- Planning
- Pre-notification
- Preparation
- Processing
- Putting it on record

TYPE

- to SHARE RESPONSIBILITY
- to TAKE DECISIONS
- to COORDINATE
- to KEEP IN TOUCH
- to INFORM
- to RECORD
- to KNOW what has been done
- to CREATE IDEAS
- to DISCIPLINE
  - to MONITOR
    - to see what has to be done
  - to "MOVE"
    - to get someone to do it
- for THERAPY
  - to CREATE CONFLICT
  - to PUNISH or REWARD individuals
    - to MOTIVATE
    - to DEMOTIVATE
  - to REMOVE CONFLICT
  - to INVOLVE
  - to GET TO KNOW PEOPLE

PLANNING
- What are the objectives of the meeting ?
- What subjects should be included ?
- Who is involved ?
- What info" / things are required ?

(see F 75)

PRE-NOTIFICATION
- Agenda (items on agenda)
  - what is the item ?
  - why is it included ?
  - what the meeting hopes to achieve under this item.

(see F 76)

PREPARATION
- Agenda (Planning discussion)
  - what connections (if any) between items.
  - what order for discussion ?
  - how much time for each ?

(see F 77)

PROCESSING
- Per item :-
  - state proposition,
  - give evidence,
  - discuss evidence,
  - state conclusions,
  - make decisions
- In general :-
  - keep members to the matter under discussion,
  - avoid covering ground twice,
  - control private discussion,
  - consider group behaviour.

PUTTING IT ON RECORD
- Summarise conclusions.
- Record decisions, action to be taken & responsibilities.

(see F 78)

LISTENING

* WHAT IS LISTENING ?
* HOW TO LISTEN EFFECTIVELY
* WHY PEOPLE AVOID LISTENING

WHAT IS LISTENING ?

- Listening is ..... ▸RECEIVING ..... & ..... ▸TRANSMITTING
  - ∘ Hearing words & tones.
  - ∘ Seeing behavioural non-verbal cues.
  - ∘ Perceived feelings.
  - ∘ Encouraging the speaker :-
    - to show you are listening,
    - to show you are interested.
  - ∘ Paraphrasing :-
    - to show you understand.

▼ INTERPRETING THE MESSAGE & HELPING THEM TO COMMUNICATE

- Not listening is .... ▸NOT RECEIVING ..... & ..... ▸NOT TRANSMITTING
  - ∘ Thoughts elsewhere
  - ∘ No thoughts, preoccupied.
  - ∘ Thinking what to say next.
  - ∘ Trying to 'get a word in'.
  - ∘ No contact, no non-verbal cues or eye contact.
  - ∘ You interrupt with :-
    - Ridicule & nit-picking,
    - argument.

▼ WASTING YOUR TIME & THE SPEAKER'S TIME TOO.

AVOIDING LISTENING

- People 'avoid listening' in order to :
  - avoid facing a problem / reality,
  - avoid 'bad news',
  - avoid ideas which contradict their own ideas, preconceptions, stereotypes & myths,
  - avoid a 'rejected' communicator,
  - avoid having to think about too many things at once.

PAPERS :-
A.328, 329, 349 - LISTENING

LISTENING EFFECTIVELY

- Paraphrasing.
- Positive response.
- Improving observation.
- Memory & notetaking.
- Asking questions.

PARAPHRASING

- ∘ Saying the message back in your own words
  - shows you are getting it correctly,
  - shows you are listening & understand.

"I hear you say ....."
"I understand you mean ....."

"Arc of Distortion"

A thinks
A says → B hears
B thinks
B says → A hears
A thinks

POSITIVE RESPONSE

- ∘ "Give 3 reasons why you like an idea before you demolish it."

MY VIEW OF MY IDEA

GOOD	BAD

YOUR VIEW OF MY IDEA

GOOD	BAD

YOUR VIEW AFTER +VE RESPONSE

GOOD	BAD

IMPROVING OBSERVATION

- ∘ Communication is :-
  - 7% through words.
  - 38% through tones.
  - 55% through non-verbal cues → Emotions & feelings may be transmitted.

ASKING QUESTIONS

- ∘ What effect have the Q's upon the 'speaker' ?
- ∘ What effect have the Q's upon the 'message' ?
- ∘ What effect do your Q's have upon you ?
- ∘ What effect do the speaker's Q's have upon you ?

WHAT TYPES OF QUESTIONS ?

- Open, probing, hypothetical.
- Closed, comparison, leading.
- Reflective, to defuse emotion.
- Multiple, to confuse.

MEMORY & NOTE TAKING

- ∘ How can you remember better? → NOTETAKING → Keyword notes - less bother.
  - -at intervals
  - -after intervals
- ∘ Do you need to remember?

Notetaking may damage the atmosphere of the conversation.

∝ Issue 3

LETTER WRITING

* WHY WRITE LETTERS ?
* HOW TO STRUCTURE LETTERS
* THE LANGUAGE OF SALES LETTERS

WHY WRITE LETTERS

- To transmit ideas / information.
- To change ideas.
- To sell or influence.
- To get ideas (in response).
- To record ideas & facts.
- To amuse or impress

WHY WRITE A LETTER ?

- What is the best way to communicate .... these aims... .... to this person.
- If a letter is the best way then use it.

HOW TO STRUCTURE LETTERS.

- What do you wish to achieve?
- Through which medium can you best achieve it ?
- How can you structure your letter :- to meet its aims, for your readers.

WAYS OF COMMUNICATING

- letter,
- memo / circular,
- telex / telegram,
- telephone,
- report,
- proposal,
- face-to-face interview,
- presentation,
- by electronic apparatus, etc.

THE LANGUAGE FOR SELLING

- Short sentences.
- Simple words.
- Active verbs.
- Adjectives & adverbs.
- Paragraphs.
- Business English
- Clichés

SHORT SENTENCES

- Fewer than 20 words.
- Average ⩽ 17 words.
- Not all the same length.

SIMPLE WORDS

- Short words.
- Unambiguous words.
- Minimise jargon.

ACTIVE VERBS....

- Keep the tone bright, positive, confident.

ADJECTIVES & ADVERBS

- Excessive use debases their value / meaning.
- Use them carefully to make the meaning more precise.

BUSINESS ENGLISH & CLICHÉS

- Avoid 'business English'.
- Avoid clichés.
- Avoid hackneyed literary phrases.
- Talk to the reader through the written text.

PARAGRAPHS

- Use paragraphs to help understanding.
- One idea/theme per paragraph.
- Keep them short to keep the reader 'moving' & alert.

DESIRE

- Say what we can do for them & create the desire to own/participate

STRUCTURE

Include :-
- Attention
- Interest
- Desire
- Belief
- Action

ATTENTION

- Avoid the appearance of a circular letter.
- Use recipients name.
- Sign it personally.
- Use good quality paper.
- Keep it short.
- Consider eye appeal.

INTEREST

- Refer to reader's problems
- Look at solutions to their problems.
- Use 'you' more than 'I' or 'we.'

ACTION

- Close, but keep initiating & seeking a positive response.

BELIEF - show them that "you can do it."

e.g. STATUS - Age; growth; international standing.
STAFF - Recruitment & dev't. standards.
PRODUCTS - Development efforts & logical soundness.
REPUTATION - Recording records by clients.
IDEAS - How other clients have benefited in the same areas / situations.

PAPERS :-
A.107 - The choice of words.
A.200 - Sales letter writing.
A.201 - Persuasive communication

Issue 2

REPORT WRITING

* WHY WRITE REPORTS ?
* HOW TO STRUCTURE REPORTS.
* USE OF DIAGRAMS, APPENDICES & EXHIBITS.

WHY WRITE REPORTS ?

- To transmit ideas.
- To change ideas.
- To get ideas - in response.
- To record ideas & facts.
- To amuse or impress.

WHY REPORTS ?

- What is the best way to communicate .....
  - to this audience ?
  - to achieve these aims ?
- If a report is the best way then use it - effectively.

DIAGRAMS

- Put simple diagrams in the body of the report.
  - better communication,
  - easier reading.
- Use - graphs,
  - bar charts,
  - pie charts,
  - maps,
  - moving averages,
  - flow diagrams & charts,
  - diagrams & pictures,
  - algorithms.

APPENDICES

- Put as much information as possible in the appendices with reference to them in the text.

EXHIBITS

- Include large sheets & diagrams folded & in plastic envelopes if they cannot be bound into the report.

HOW TO STRUCTURE REPORTS

- What do you want to achieve ?
  - What is the purpose ?
    - to inform ?
    - to persuade ?
    - to recommend ?
- Consider your readers
  - Who are your readers ?
    - are they experts ?.... jargon is acceptable.
    - are they uninformed ?... keep it simple.
    - are they decision makers ?
    - how will they see you.. what impression will you make?
- Structure of the report

STRUCTURE

- Title Page
- Contents Page
- Introduction
- Summary of Recommendations
- Main Body of Report
- Conclusions
- Appendices

TITLE PAGE

- Clear layout.
- Brief descriptive title.

CONTENTS PAGE

- Report title & date.
- Contents & page no's
  - parts of report,
  - subheadings,
  - appendices,
  - exhibits.

INTRODUCTION

- Who requested the report ?
- Why ?
- Links with earlier reports.
- Who did the work.
- Objective of the report.

SUMMARY

- Optional.
- Useful with a long report or busy readers.

MAIN BODY

- Present situation .... factual description, not too long.
- Findings ..... deductions... eg. what is wrong & why it is wrong.
- Possible action .... all realistic alternatives.. ... costs & benefits.
- Recommendations .... what should be done.. ... why it should be done... help needed.

CONCLUSIONS

- Be brief.
- No new material.
- Acknowledge help given.
- Restate benefits & recommendations.
- End on hopeful note.

PAPERS :-

A.106 - PRINCIPLES OF REPORT WRITING.
A.107 - THE CHOICE OF WORDS.
A.201 - PERSUASIVE COMMUNICATION.
A.299 - ALGORITHMS.
A.430 - BUSINESS CHARTS.
A.482 - CHECKLIST FOR ANALYSING QUALITY OF REPORTS
A.497 - THE SENTENCE.

FILM :- OH, WHAT A LOVELY REPORT!

MANAGEMENT OF TIME (PERSONAL)

* Why must a supervisor manage his time?
* Where does time go?
* How can time be planned?
* How can time be saved?

PAPERS :-
A 101 - SELF MANAGEMENT
C 290 - IN TRAY EXERCISE
C 376 - TIME LOGGING EX.
FORMS :-
40 → 45; 79; 80; 89; 90; 93 → 95

WHY MANAGE TIME ?
- To set priorities. → In-Tray Exercise C 290
- It is an irreplaceable resource.

WHERE DOES TIME GO ? → Time Logging Exercise C 376
- Useful work
  - Routine work
  - Regular job duties
  - Special assignments
  - Creative work
- Wasted time
  - Lack of focus
  - Failure to delegate
  - Failure to communicate
  - Failure to look ahead
  - Interruptions
  - Fatigue

See Time Analysis Forms & Diaries

SAVING TIME
- Communicate
- Cut down paperwork
- Make decisions
- Set specific times
- Control interruptions
- Make notes

MAKE NOTES
- Note - task,
  - completion time
- See F 42 - Job Card

CONTROL INTERRUPTIONS
- Stick to topic, OR
- Fix appointment.

SET SPECIFIC TIMES
- Fix appointment.
- Specify duration.
- Keep to it.

MAKE DECISIONS
- Be decisive.
- Don't put decisions off unnecessarily.

CUT DOWN PAPERWORK
- Eliminate forms.
- Reduce records.
- Delegate.
- Handle once only.

COMMUNICATE
- Check understood.
- Keep on subject.

ROLE PLAY EX.
In Pairs :- coach a subordinate on time management. Use real or invented problems.

WHERE DOES TIME GO ?
- Activities
- Functions

FUNCTIONS (see F 79)
- Assigning work.
- Instructing employees.
- Inspecting work.
- Expediting orders.
- Time cards & other reports.
- Preparing schedules.
- Safety/health.
- Counselling employees.
- Creative self-improvement.

ACTIVITIES (F 80)
- Personal contacts.
- Telephone.
- Paperwork.
- Meetings.
- Travel.

USEFUL WORK

ROUTINE WORK
- Filling in time cards.
- Answering mail & memos.
- Completing pay reports.
- Filing & paperwork.

REGULAR JOB DUTIES
- Directing & checking employees.
- Giving work assignments.
- Checking product quality.
- Training workers.
- Counselling employees.

SPECIAL ASSIGNMENTS e.g.
- Safety training programme.
- Study of M/C operating costs.

CREATIVE WORK e.g.
- Improving work methods.
- Simplifying procedures.
- Special job training.
- Removing conflict situations.

WASTED TIME

LACK OF FOCUS
- Failure to finish jobs.
- Lack of systematic approach.

FAILURE TO DELEGATE.
- Not passing jobs on.

FAILURE TO COMMUNICATE
- Failure to plan comm^n.
- Failure to check comm^n successful.

FAILURE TO LOOK AHEAD.
- "Stitch in time saves nine."
- Catching problems when small.

INTERRUPTIONS
- Conversation a waste of time.

FATIGUE
- Day dreaming / lost concentration
- Procrastination

ISSUE 2

PLANNING & CONTROLLING TIME

* SETTING PRIORITIES
* PLANNING & CONTROLLING TIME

SETTING PRIORITIES

- Deciding how much time should be allocated to each job
- Consider :
  - Urgency v. Importance
  - What you do now
  - What you should be doing

Parkinson's law

"Work expands in such a way that it fills the time available."

URGENCY v IMPORTANCE

- Don't let the urgent less important jobs push out the important less urgent jobs.

URGENCY v IMPORTANCE

- Some jobs must be done, but all jobs cannot necessarily be done.
- Decide :
  - what jobs will be done & how much time for each.
  - what jobs cannot be done.

(See F. 40, 41, 79, 80, 93 & 95)

WHAT YOU SHOULD BE DOING

- Identify your tasks.
- Allocate time to each task.
- Measure how you spend your time.
- Identify where time can be saved

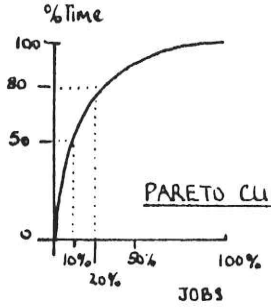
WHAT YOU SHOULD BE DOING

- Interruptions, how much time can you justify on interruptions?
  - set appointments,
  - stop telephone,
  - delegate properly, etc.
- Breaking off jobs. Minimise stopping & starting; finish job before moving on to next.

WHAT DO YOU DO NOW ?

- Measure what you do now :
  - your TASKS ; the constituent parts of your job e.g. planning, appraising, disciplining, etc
  - your ACTIVITIES ; ways of spending your time eg. meetings, travelling, thinking, being interrupted, etc
- Identify where time can be saved.

(See F. 90)



PARETO CURVE

(20 : 80 rule)

PLANNING & CONTROLLING

- Deciding when to do each job & monitoring that jobs have been done.
- Consider :
  - Networks & Bar Charts
  - Job Cards
  - Diaries

DIARIES

- for planning work schedules.
- for recording work done.
- for reminding about ...
  - expenses,
  - job costs, etc.

(See F. 43, 44 & 94)

JOB CARDS

- for displaying forward load & priorities.
- for records & reminding.

(See F. 42)

NETWORKS & BARCHARTS

- Plan complex jobs in detail.
  - Networks to establish logic & sequence.
  - Barcharts for resource allocation & control.

(See F. 45, 89)

PAPERS :- A31, A101,
FORMS :- 40 - 45; 79; 80; 89; 90; 93 - 95.

TIME MANAGEMENT - USING PERSONAL TIME BETTER

* HOW TO HANDLE INTERRUPTIONS
* HOW TO DELEGATE WORK
* HOW TO PLAN THE DAY

INTERRUPTIONS

- How to avoid them
- How to minimise their effect
- How to benefit from them

AVOIDING THEM

- Be prepared to say 'No' - tell other person why you said "No"
- Ask them to come back later - fix appointment with time; duration; subject.
- Go somewhere where you won't be interrupted
- Delegate properly - other person deals with the whole problem.

REDUCING THEIR EFFECT

- Break jobs into parts - finish each part before breaking off.
- Use time when you are likely to be interrupted to do small jobs eg. reading; filing; etc.

BENEFITTING FROM INTERRUPTIONS

- Interruptions can :-
  - give you a new slant on a problem.
  - give you an opportunity to help others.
  - show you you're wanted.

DELEGATION

- What is it ?
- How to do it ?
- Problems of delegation
- Advantages of deleg^n

ADVANTAGES

- Gains respect.
- Trains & develops staff.
- Lets you do something else.

PROBLEMS OF DELEGATION

- Lack of trust.
- Unnecessarily high standards of time & quality.
- Lack of self confidence.
- Fear of taking decisions

so

- Be clear about what is required.
- Allow discretion concerning time & method.
- Be prepared for mistakes.
- Give feedback, praise & blame.
- Support your subordinate since you are still responsible.

HOW TO DELEGATE

- Plan it. Delegation can be part of of their training.
- Tell them :- what is to be done & why,
  - the results & their authority.
- Tell others what authority is given.
- Check progress at agreed intervals; help only if asked.
- Give constructive feedback afterwards.

WHAT IS DELEGATION ?

- Delegation is giving someone the freedom & authority to handle certain things with confidence that they will do it successfully.
- Delegation varies in degrees ....
  - Instruction (do it my way).
  - Delegation (do it your way & ask if you want help).
  - Abdication (do it any way & don't ask for help if it goes wrong).

PLANNING THE DAY

- What has to be done ?
- When should it be done ?

WHEN SHOULD IT BE DONE ?

- Not all jobs can be done. Rate jobs A's, B's & C's - drop C's.
- Only a few jobs will fit into the day in the limited time available.
- You cannot do all jobs perfectly; allocate time & stick to it.

- How much time is available ?
- How much time is required ?

MATCH THE TWO

using barcharts; diaries; job cards; etc (See F 45 ; 89 ; 42)

WHAT HAS TO BE DONE ?

- Job cards (F 42), one card/job. Sort them by date.
- Network analysis helps identify what jobs need doing & their order.
- Allocate different jobs to different days. Consider appropriateness of time of day to the planned task, as well as the day of the week.

Job Card	To be done by:-	To be done on:-	Time
WHO:-	ADDRESS:-	TEL. No.	
Notes:-			

F 42 (or design your own)

Issue 2

MANAGEMENT of TIME

* Why must a manager manage his time?
* Departmental time management

MANAGING HIS TIME

- The importance of time mgt.
- Where does time go?
- Time management tools.
- Conserving time.

WHY IMPORTANT?

- Manager usually faces more jobs than there is time to do them.
- Jobs have different priorities.
- Some jobs have to be done & others delegated, ... which?

WHERE DOES TIME GO? Usefully.

- Routine jobs (minor jobs but important).
- Regular duties
- Special assignments (unpredictable)
- Creative work (requires time)

WHERE DOES TIME GO?

Wasted & lost due to:-

- Lack of focus on task.
- Failure to delegate.
- Interruptions.
- Fatigue - losing concentration.
- Failure to communicate
- Failure to anticipate

Anticipate trouble, different situations, lack of planning, etc.

- Receiver doesn't listen.
- Transmitter repeats instructions.
- Transmission not accurate.

DEPARTMENTAL TIME MGT.

- Time pressures.
- Maximise time usage.
- Components of total job time.
- Methods of time planning.
- Keep records.

Production, Completion, Delivery deadlines.)

Careful network planning will assist the manager to reorganise & reduce time pressures, eliminate wasted time & maximise time usage.

KEEP RECORDS

- For future reference - record & keep times for specific jobs.

METHODS OF TIME PLANNING

- Network planning for long jobs (& critical path analysis.)
- Gantt charts.
- Plan priority sequences.
- Ordered sequences.
- Short-term scheduling

  - Fill-in jobs for waiting time between longer or larger jobs.

  - An end-of-day activity preparing for tomorrow.

MAXIMISE TIME USAGE

- Work sampling & time study techniques may apply here.
- Set time standards for jobs with realistic (∓) allowances.
- Use standard data catalogues for estimating job durations.

CONSERVING TIME

- Learn to communicate effectively.
- Train subordinates to listen by Q & A techniques.
- Organise meetings effectively - don't just hold them.
- Reduce paperwork (form filling is slow, is it all necessary?)
- Control interruptions. (See S 254-s)
- Set time objectives for tasks.

TIME MGT. TOOLS

- Analysis of time usage. (Past)
- The time budget. (Future)

  - Allocate time to specific tasks.
  - Plan a weekly time schedule & keep to it.

  - log activities
  - classify activities

COMPONENTS OF TOTAL JOB TIME

- Inherent Time - sum of labour time, machine time & handling time.
- Set-up Time - time to prepare or tear-down after work. % time wastage reduced by scheduling longer runs.
- Lost Time - personal time for breaks, toilet, sickness, holidays. etc.
- Technical Time - machinery failure or component shortage.
- Learning Time - familiarisation with the job. Can only be estimated & is often inaccurate.

MANAGING YOUR TIME

* WHERE DOES TIME GO ?
* USE TIME BETTER
* SCHEDULING JOBS

WHERE DOES TIME GO?

- Useful work
- Wasted time

ROUTINE WORK
- Answering mail & memos.
- Planning & writing reports.
- Filing & other paperwork.
- Form filling, making returns.

REGULAR JOB DUTIES
- Directing & monitoring subordinates.
- Assigning & delegating work.
- Checking on quality.
- Counselling.
- Coaching/training.

SPECIAL ASSIGNMENTS
eg. projects; enquiries; visits; innovating; etc.

CREATIVE WORK
eg. - improving work methods,
- special job training,
- removing conflict situations,
- simplifying procedures, etc.

LACK OF FOCUS
- Lack of systematic approach.
- Failure to complete jobs.

FAILURE TO DELEGATE
- Only you can do that particular job properly ?

FAILURE TO COMMUNICATE
- Failure to check understanding.
- Failure to plan communication.
- Repeating instructions.

FAILURE TO LOOK AHEAD
- Catching problems while they are still small.
- Reluctance to make decisions <u>now</u>.

INTERRUPTIONS
- Unimportant phone calls.
- Friends who drop in to gossip.

FATIGUE RELATED PROBLEMS
- Daydreaming & losing concentration.
- Procrastinating.

GROUP EXERCISE
List at least 4 items from each category of useful and time wasting activities.

SCHEDULING JOBS

- Decide the order in which jobs should be done.
- Consider jobs which:
  - need concentration,
  - have a degree of unpleasantness,
  - are lengthy.

USE:
- Job Cards,
- Diaries,

to plan & record work done.

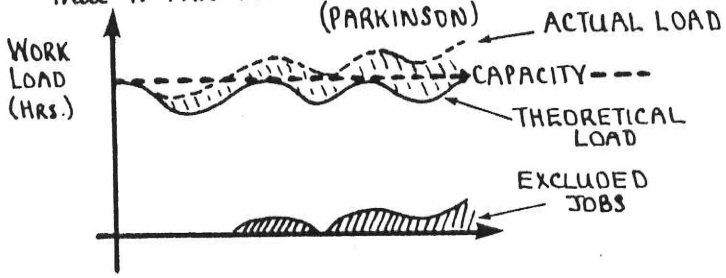
LONG JOBS
- Break into distinct parts.
- Finish each part before moving on.

UNPLEASANT JOBS
- Do unpleasant jobs as soon as possible.
- Minimise breaking off & restarting again, eg.
  - Handle mail once only.

CONCENTRATION
- Schedule a time & place where there will be the minimum of interruptions.

USE TIME BETTER

"Work expands in such a way, that it fills the time available."
(PARKINSON)



URGENCY v. IMPORTANCE
- Don't let the 'urgent, less important jobs' push out the 'important less urgent jobs.'

GROUP EXERCISE
How do you differentiate between URGENCY & IMPORTANCE?

PAPERS:-
F 42; 43; 44; 45; 89; 90; 94

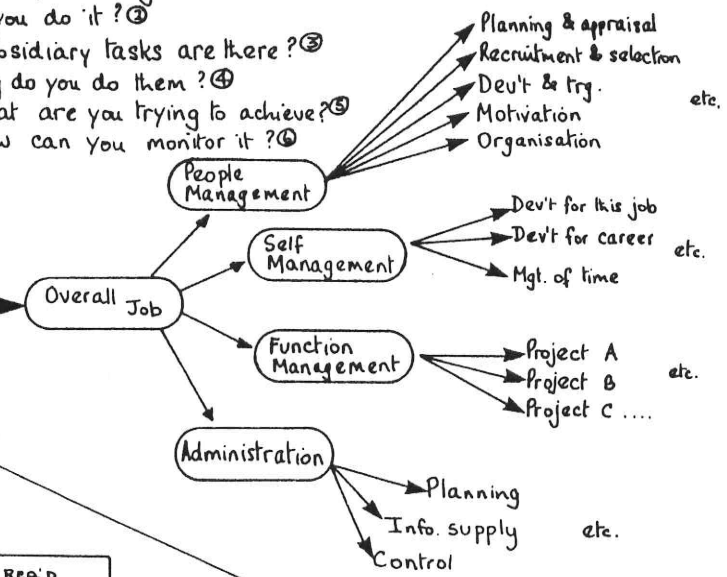
◄ ISSUE 2

SETTING OBJECTIVES

* What should you be doing ?
* What prevents your doing it better ?
* What can you do to improve your performance ?

WHAT should you be doing ?

- Identify your jobs.
- Estimate time required for each.
- Subdivide job into key tasks. (– see table below)
- Analyse job by each key task. ①
  - why do you do it ? ②
  - what subsidiary tasks are there ? ③
    - why do you do them ? ④
    - what are you trying to achieve ? ⑤
    - how can you monitor it ? ⑥



* What prevents you doing it better ? ⑦

- Lack of time ?
- Lack of knowledge ?
- Lack of authority
- Lack of drive (motivation) ?

ie. constraints

PAPERS :-

7.01 - Mot'g by setting Objectives
A361 - Setting personal goals
A450 - M.B.O.
C324 - Setting personal objectives
F64 ; 65 ;

* What can you do to improve your performance ?

⑧ • what actions should you take ?
⑨ • How should you allocate your time ?
⑩ • How should you monitor your achievement ?

KEY TASKS ①	OBJECTIVES ②			TIME REQ'D % Total Time	
Subsidiary Tasks ③	OBJECTIVES Why ④	What ⑤	How ⑥ ⑩	CONSTRAINTS ⑦	ACTION PLAN ⑧	TIME ⑨

F65

% TIME	per hour	per day	per week	per month	per year
1%	1m	5m	1h	2h	3d
5%	3m	25m	2h	10h	13d
10%	6m	50m	4h	20h	5w
25%	15m	2h	10h	4d	13w
33%	20m	3h	13h	7d	17w
50%	30m	4h	20h	11d	23w

Issue 4 Nov 8

SETTING TIME OBJECTIVES

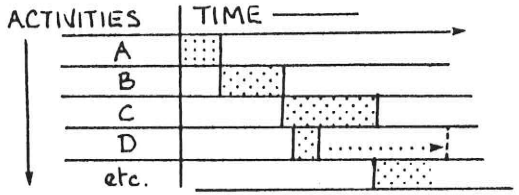
* How can the sequence & timing of operations be planned?
* What techniques can be used to help plan the timing of operations?

→ The timing of operations.
- Verbal plan. → VERBAL PLAN
  - hard to quantify.
  - hard to co-ordinate.
  - hard to communicate.
- Diagrammatic plan → DIAGRAMMATIC PLAN
  - permanent record.
  - can demonstrate logic.
  - aids understanding since easier to visualise.
  - easier to compare with others.

METHODS OF PLANNING TIMING OF OPERATIONS

- Network analysis
- Bar charts (Gantt charts)

BAR CHARTS



A representation of the schedule of activities on a time scale

CONSTRUCTION OF NETWORKS (Arrow activity type)

- Events or nodes. — ○ or ⬭
- Activities. →
- Dummy activities. - - - →

TIMING OF NETWORKS

- Activity duration.
- Earliest start.
- Latest finish.
- Float.

The permissible delay on the activity.

The latest time by which activities entering an event must be finished if delay is to be prevented.

The earliest time possible for an activity leaving a node to commence.

The length of time (in whatever units) for the activity to be completed.

ACTIVITIES LOGIC

- All activities related to the project must be included in the network.
- They are drawn in their natural order so that any activity which has to wait for a previous activity to finish must be drawn after that activity in the network.

DUMMY ACTIVITY LOGIC

- Dummy activities are introduced into a network to help the logic.
- Dummy activities tie events together so that activities leaving one event can be restrained from starting until another event is completed.
- Dummy activities take no time to complete.

EVENTS (OR NODES) LOGIC

- These are drawn at the beginning & end of each activity.
- No activity leaving the event may start until all activities entering the event are finished.

PAPERS :-
A31 - Network Analysis Techniques
A501 - Network Analysis

MANAGING DEPARTMENTAL TIME

* AN OPERATING DEPARTMENT MUST MANAGE ITS TIME
* MEASURING TIME IN A DEPARTMENT
* MANAGING TIME IN A DEPARTMENT

WHY MANAGE TIME ?

- To schedule work.
- To justify / acquire staff.
- To assess effect of changes.
- To meet deadlines.
- To meet delivery dates.

TO MEET DEADLINES by means of :-
- Equipment changes,
- Method improvements,
- Information collection,
- Delivery / completion targets.

MEASURING TIME

- Activity sampling
- Work study
- Elemental time standards
- Standard data

ACTIVITY SAMPLING
Periodic observation & recording of time devoted to the component steps or activities of a job by means of identifying :-
- Productive : non-productive time,
- Administrative : 'productive' time,

by sampling at random intervals.

WORK ACTIVITY SHEET			
Department / Operator		Subject / Date	
WORK ACTIVITY	Observ'n	Totals	%

C.96
F. 22 a & b

WORK STUDY identifies the :
- Production of an average skilled worker in motivated performance on a job with which (s)he is familiar.
- Considers allowances for fatigue; relaxation; personal time & interruptions.
- Skilled work study officers are needed to assess ..... skills available, performance, experience, allowances, etc.

STANDARD DATA
- Entire times for standard tasks are given in catalogues / manuals.
- Compiled from work study or elemental time standards.

ELEMENTAL TIME STANDARDS
- Carefully establish time standards for the performance of various small movements of hand or foot.
- Standards are added together to get standard time for the entire task.
- Skilled operators are watched to give accurate times for elemental tasks.

- Inherent time.
  - Labour time (man & m/c),
  - Machine time (m/c only),
  - Handling time (man only).
- Set up time.
- Lost time
  - Learning time,
  - Technical time (m/c or material shortage),
  - Personal time (breaks & leave).

HOW TO MANAGE TIME

- With longer jobs ....
  - GANTT or BAR charts,
  - PERT or NETWORK diagrams.
- With shorter jobs ....
  - Straight line v. parallel plans
  - Ordered sequences
  - Priority agenda

PRIORITY AGENDA

Daily agenda of things to be done	
Priority	

- ✓ Jobs completed, carry on rest until tomorrow.
- Mark priorities A, B or C & eliminate C's.
- Do agenda at end of day.
- Do weekly agenda too.

- Can activities be run in parallel rather than end-on?
- Are the resources available?

ORDERED SEQUENCES
- Has supervisor the discretion over the sequence of operations?
- Can (s)he use this discretion to smoothe the work flow?

PAPERS
A.54 - Introduction to work study.
A.290 - Intro. to office work study.
A.31 - Network Analysis techniques.
7.39; 7.41 - Mgt. of Personal Time.
C.96 - Activity sampling exercise.
C.97 - Diary editing exercise.

RECORDING TIME (HOW DO I SPEND MY TIME ?)

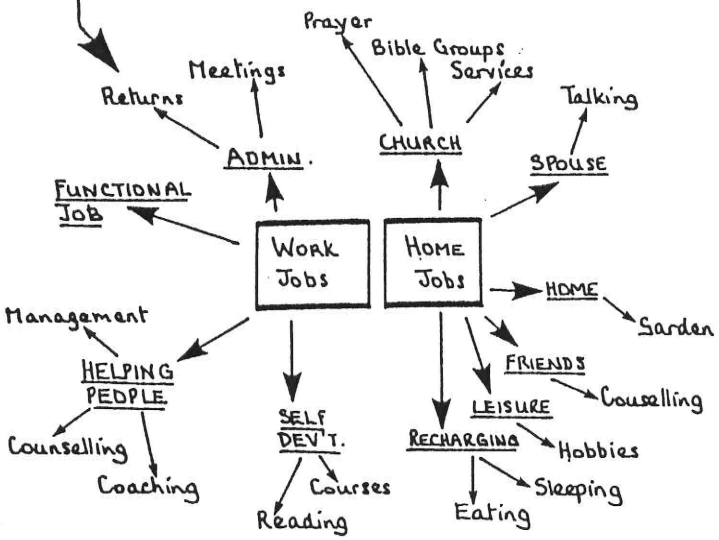
* WHY IS THERE NEVER ENOUGH TIME ?
* WHERE IS MY TIME BEING WASTED ?

WHY NEVER ENOUGH?
- Interruptions.
- Breaking-off jobs.
- Laziness.
- Worry.
- Forgetfulness.
- Don't want to do it.

PARKINSON'S LAW
"Work expands to fill the time available."

Result
Urgent, not important jobs take over time from less urgent, more important jobs.

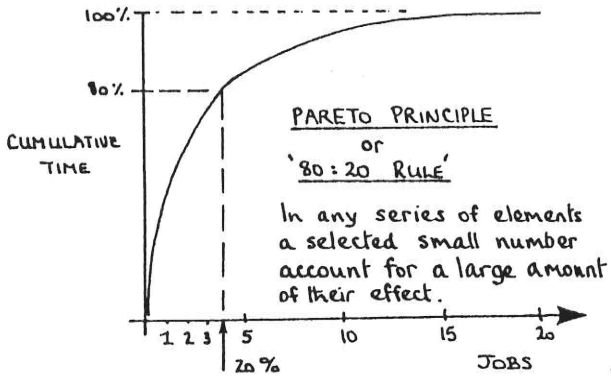
WHERE IS MY TIME GOING?
- What jobs do I do ?
- How long should I spend on each?
- How long do I spend on each?



F. 103

HOW AM I SPENDING MY TIME ? (NOTE ANY JOB THAT COMES TO MIND)	HOW MUCH TIME DO I SPEND ? TOO LITTLE	JUST RIGHT	TOO MUCH	IS THIS JOB URGENT or IMPORT'T URGENT	IMPORTANT

- How to differentiate between urgent not important jobs & not urgent important jobs.
- You have time to do all of the jobs some of the time but only some of the jobs all of the time.



PARETO PRINCIPLE
or
'80 : 20 RULE'

In any series of elements a selected small number account for a large amount of their effect.

	/min.	/hr.	/day	/wk.	/month	/year
1 %	0·6 s.	40 s.	¼ hr.	1¾ hr.	7 hr.	3½ day
2 %	1 sec	1 min	½ hr.	3½ hr.	14 hr.	7 day
5 %	3 sec	3 min	1¼ hr.	8½ hr.	35 hr.	18 d.
10 %	6 sec	6 min	2½ hr.	17 hr.	70 hr.	36½ d.
25 %	15 s.	15 min	6 hr.	42 hr.	200 hr.	91 d.

PAPERS :-
F. 103 F. 40a ; 41 ;
F. 93 ; 104 ; 79 ; 80 ;

DIARY

* How big do you want it to be ?
* How many days per page ?
* What information on each diary page ?
* What other information ?

HOW BIG ?

- Desk diary
- Brief case diary
- Pocket diary
- Wall chart

DESK DIARY

- Usually 'legal' size (A4 metric). Can be used in addition to a pocket or brief case diary as a central record, possibly < 1 year.
- Alternatively have wall chart to record appointments (short- & long-term eg appraisals).
- There are problems from having two diaries !

BRIEF CASE DIARY

- As big as a desk diary or down to about 6" x 8" (A5 metric)
- Holds more information than a pocket diary but needs a carrying case.

POCKET DIARY

- Usually about 4" x 6" by ½" thick
- A plain notebook will do, often increasing in thickness by 50% as notes are inserted.

WALL CHARTS

- Can be as big as the wall !
- Made bigger using hinged panels.
- If used by several people ..... use coded colours, shapes, pins, etc. for people & activities Have ample space to record appointments which may coincide.

Issue 2

PAPERS :-
Forms F. 43, 44, 45, F. 89, 94, 102.

WHAT OTHER INFORMATION ?

- Have one page for :-
  - friends' telephone numbers,
  - business telephone numbers,
  - ideas for presents (birthdays & xmas),
  - books to read,
  - quotations,
  - good ideas to follow up,
  - recipes / menu ideas,
  - prayer requests & prayers answered,
  - useful tools seen,
  - concepts,
  - entertaining - who to ask & when asked,
  - places to visit,
- Maps of underground / subway systems,
- Put aside 12 pages - 1 for each month - for :-
  - birthdays, anniversaries & year (which number ?)
  - what to plant & what is planted,
  - flowers / trees / shrubs seen & worth noting,
- Have pages for personal finance ——(See example)
  - budget & expenditure
  - note recurring expenses eg. telephone bill due, subscriptions due etc
  - motoring costs ● daily & periodic (repairs, tyres, oil & plug changes ; servicing ; etc.)

HOW MANY DAYS PER PAGE ?

- There are many standards,
  - 1 day / page (see F. 43)
  - 7 days / page (see F 44 or 94)
  - weekly or monthly summaries (see F. 45 or 102)
  - year & next year summaries (see F. 89)
- On 1-day or 7-day pages it is often useful to clip a corner when the page is finished.

PERSONAL FINANCES

CATEGORIES	A CASH SPENT	B CHEQUES CASHED	A+B TOTAL SPENT	C BUDGET	(C-(A+B)) VARIANCE + or (-)	C/F VARIANCE	D INCOME	E BUDGET INCOME	E-D VARIANCE + or (-)	C/F VARIANCE

DATE	MILEAGE	PETROL	MILES COVERED	PETROL USED	M.P.G	DAYS	M / DAY	OTHER EXPENSES (OIL, PLUGS etc.)

- Budget your expenditure month by month.
- Budget your income month by month.
- Check one against the other

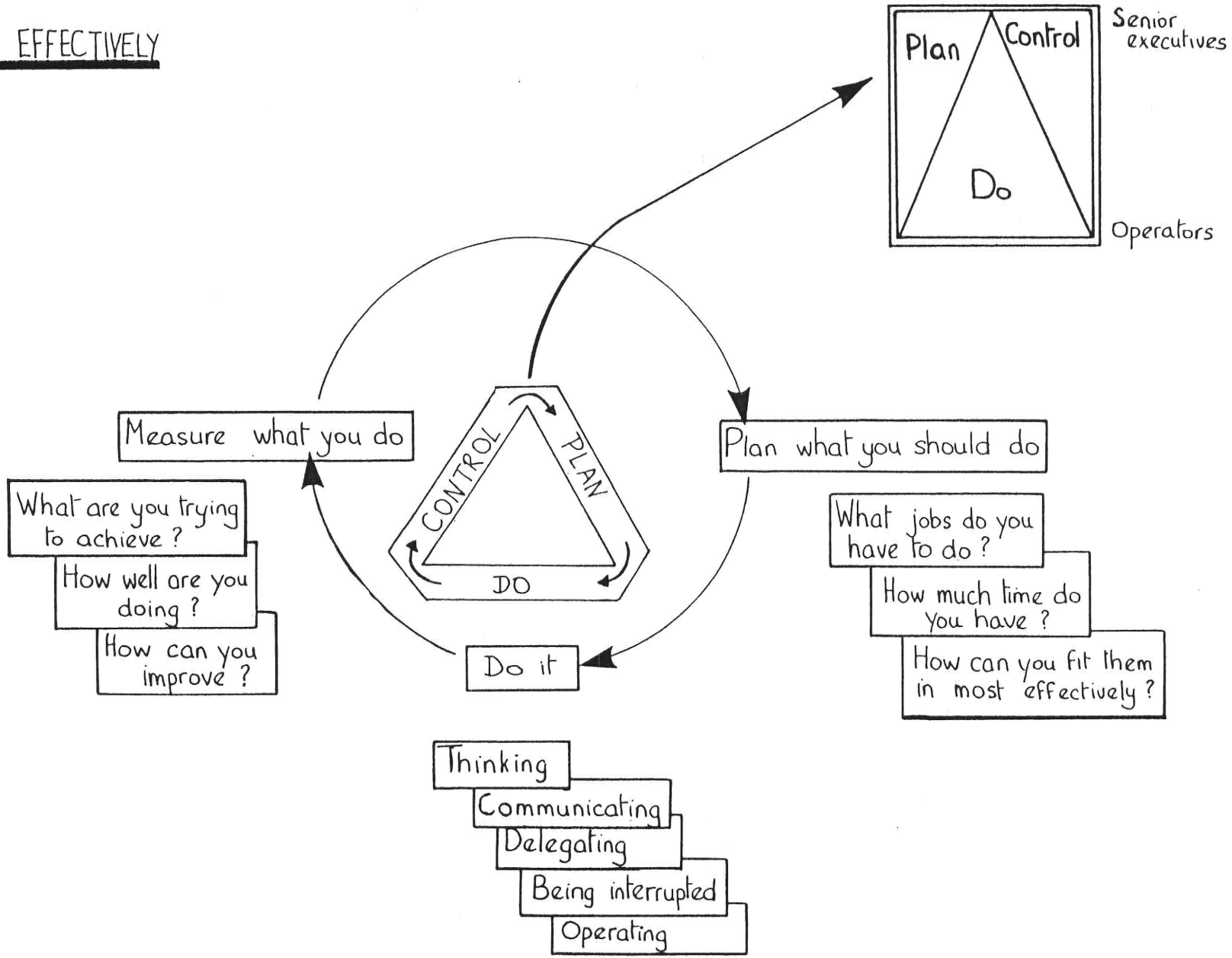
CATEGORISE YOUR EXPENDITURE

- Housekeeping (incl. petfoods & entertaining)
- Clothes
- Toiletries, hairdressing, etc
- Charitable gifts & presents
- Vacations (incl. travel, hobbies, etc.)
- Utilities (heating, lighting, telephone, etc)
- Professional services (incl. bank, insurances, etc.)
- Local taxes & licenses.
- Children (incl. educ. expenses & pocket money)
- House maintenance (cleaning, gardening, etc.)
- Motoring expenses

WHAT INFO™ ON EACH PAGE ?

- Jobs to do & jobs done.
- Appointments.
- Notes.
- Expenses.
- Mileages.
- Birthdays & vacations
- Children's school terms (start/end)
- Time changes
- Letters sent, bills paid, meter readings, household jobs, present/cards to send, etc.

USING TIME EFFECTIVELY



SELF MANAGEMENT - SETTING PRIORITIES

* SETTING PRIORITIES
* PLANNING THE WORKLOAD

SETTING PRIORITIES means
- Deciding the order in which the main jobs should be handled.
- Deciding the degree of urgency.
  - Which jobs require immediate attention? → Must be done very soon if it is to be effective
  - Which jobs are 'serious'? → Important that it should be done sometime.

PLANNING THE WORKLOAD
- Choosing jobs
- Scheduling jobs
- Planning jobs

CHOOSING JOBS
- Get the most important jobs done.
  - Optimise work done.
  - Avoid stopping serious jobs for un-necessary, urgent jobs.
- Get the maximum amount of work done.
  - Minimise disruptions.
  - Minimise breaking off jobs & restarting.

PLANNING TIME USAGE
- Networks,
  - show the logic of a complicated programme.
  - NETWORKS can establish the CRITICAL PATH.
- Barcharts,
  - can help plan the allocation of resources.
  - used also to monitor progress.
- Diaries,
  - for recording planned time.
- Job Cards,
  - for displaying forward load & priorities.

SCHEDULING JOBS
- Thinking jobs, scheduled for times when there will be the minimum of interruptions.
- Long jobs, should be broken into distinct parts if long time spells are not available. Finish each part.

Contents

PART 1 MANAGEMENT

Management (Corporate) Planning	8.01
What is Management	8.02
Theories of Management	8.03
The Manager as a Leader	8.04
Managerial Style 1 - How a manager gets results	8.05
Management Style 2 - Summaries of Blake & Reddin	8.06
Managerial Strengths and Weaknesses	8.07
The Role of the Manager	8.08

PART 2 MANAGERIAL SKILLS

Dealing with Resistance	8.09
Working with your Secretary	8.10
Coaching	8.11
Counselling	8.12
Target Setting and Appraisal	8.13
The Appraisal Interview	8.14
Performance Appraisal	8.15
Delegation	8.16
Getting Things Done	8.17
Influencing Styles 1 (How to get Results)	8.18
Influencing Styles 2	8.19
Creativity	8.20
Giving & Receiving Feedback	8.21
Transactional Analysis	8.22
Assertiveness	8.23
Effective Thinking	8.24
Thinking	8.25

PART 3 HUMAN RESOURCE PLANNING

Manpower Planning	8.26
Staff Planning Organisation & Development	8.27
Staffing	8.28
Personnel Records	8.29
Career Development	8.30
Job Evaluation	8.31
Job Satisfaction	8.32
Job Enrichment	8.33

The following typed information papers (A4), forms and exercises accompany certain of the Outlines in Volume 8. Their value lies in the way they expand on aspects of the Outlines themselves. Their use is optional.

INFORMATION PAPERS

A.2	Effective thinking & Communication
A.24	Problem Analysis
A.25	Decision Making
A.35	Objective setting for management appraisal
A.51	Management appraisal & development
A.75	Method Study O & M
A.101	Self Management
A.108	Organisational Relationships
A.171	Personnel Recruitment & Selection
A.183	Identifying Training Needs
A.193	Manpower Planning
A.210	Office Machines
A.212	Office Layout
A.216	Computers & their applications
A.285	Personnel & Training Records
A.299	Algorithms
A.322	Career Counselling
A.350	Thinking
A.361	Setting Goals & Objectives
A.362	Irrational aspects of decision making
A.383	Giving & Receiving Feedback
A.402	Project Evaluation
A.403	Exponential Smoothing
A.404	Transactional Analysis
A.450	Management by Objectives
A.456	Decision tree analysis
A.466	The Management Grid
A.467	Document Flowcharts
A.468	Information Storage & Retrieval
A.471	Form Design
A.477	O & M Report on the Festival Hall (Joke)
A.480	Pairs Comparison
A.481	'Organisation' -Historical quote from 210 BC
A.580	Training Design Algorithm (CRAMP)
A.583	Morphological Analysis
A.585	Cost Benefit Analysis
A.609	Coaching
A.639	Creative Thinking
A.656	The role of Management
A.659	Transactional Analysis - A psychological approach to problem solving

A.660	Transactional Analysis
A.661	Barriers to Learning
A.662	The Johari Window
A.668	Transactional Analysis - scripts, egostates,transactions & behaviour
A.672	Counselling
A.1103	Delegation
A.1346	Some causes & consequences of stress

EXERCISES

C.8	Form Design
C.11	Document Flows
C.27	Office Layout
C.131	Domestic Electrical Appliances Exercise
C.132	Decision Trees
C.146	Forecasting
C.246	Problem Trees
C.293	Blackened Filament Exercise
C.324	Setting Personal Goals (Paired Comparison Exercise)
C.328	Delegation Questionnaire
C.380 - 387	Transactional Analysis Exercises
C.432	T.A.Exercise - Your Negative Stamp Collection
C.433	T.A.Exercise - Your Gold Stamp Collection

FORMS

F	40 - 45

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MANAGEMENT (CORPORATE) PLANNING

* WHERE SHOULD THE ORGANISATION BE IN 5 YEARS ?

WHERE DO WE WANT TO BE ?
- What is this enterprise in business to achieve ?
- Where do I/we want to be ?
- What goals must I set to get there ?

* WHERE WILL IT BE IF WE CONTINUE WITH PRESENT PLANS & ACTIVITIES ?

IDENTIFY CORPORATE STRENGTHS & WEAKNESSES
- Look to the product range; finance; market standing; marketing policy; pricing; competitors; executive strengths; R. & D.; etc.
- Where are we vulnerable ?

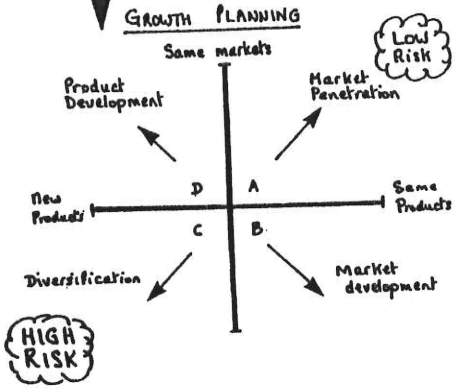
Technically .... obsolete ?
Product range ... wrong ?
Markets .... closing down ?
Competitors ... increasing ?
Pricing ... too high/low ?
Financially ... liquid & long term ?

* FEATURES OF A CORPORATE PLAN

A CORPORATE PLAN has many facets :-
- The manpower plan
- Growth planning
- Market planning (including sales)
- Organisation planning
- Financial planning
- Facility planning
- R. & D. planning

MANPOWER PLANNING considers :-

GROWTH PLANNING



R. & D. PLANNING

Research & Development covering
- Relevance to marketing programme.
- Possibility of success.
- Probable development cost.
- Probable production cost.
- Probable sales quantities.
- Probable cost effectiveness.
- R. & D. load & project schedule.

MARKET PLANNING

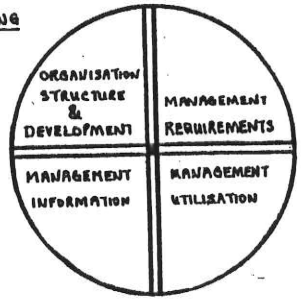
FACILITY PLANNING

Plan to meet PRODUCT/MARKET plan
- Plan material supply.
- Plan for knowhow.
- Justify projects.
- Plan timetable.

FINANCIAL PLANNING

- * AQUISITION OF MONEY – Implications of change
- * ALTERNATIVE SOURCES OF MONEY – Liquidity
- * RETURN ON INVESTMENT – by business/market/product
- * FINANCIAL CONTROL – Project evaluation/control ratios

ORGANISATION PLANNING



8.01

∝ Issue 2

WHAT IS MANAGEMENT ?

* WHAT IS MANAGEMENT ?
* HOW A MANAGER GETS RESULTS

MANAGEMENT is :-
- Using your resources as effectively as possible to provide goods or/& services.
- Working through people to provide goods &/or services.

PROVIDING GOODS & SERVICES
- What 'output' does your 'unit' produce ?
- What role does each person fulfil ?

HOW could you justify :
- your department ?
- each member of your staff ?
- all other resources ?

MANAGERS GET RESULTS by :-
- Defining the required results.
- Planning to achieve them.
- Creating the right atmosphere.
- Monitoring progress.

WORKING THROUGH PEOPLE
- Communicating
- Organising
- Getting things done

GETTING THINGS DONE
- Satisfying conflicting needs due to ;
  - lack of resources,
  - individual wants,
  - lack of trust & fairness,
  - insufficient time to manage.
- Anticipating problems & avoiding them.

What are you doing to :
- Communicate with your staff better?
- Create the situation in which they can do their job effectively ?
- Make things happen?
- Make enough time to do it ?

WHAT RESOURCES DO YOU USE ?
- Money
- People
- Space
- Equipment
- Time

MONEY
- What return do the 'owners' get from the money spent ?
- Could they get a better return elsewhere ?

PEOPLE
- How well are they motivated ?
- How well do you use their abilities ?
- Do you develop their abilities ?
- How well do they use their time ?
- How well do you use their time ?
- Do they use the best methods ?

COMMUNICATING
- Sharing of info^n, attitudes & feelings to create an atmosphere in which people :
  - want to provide the goods & services,
  - are able to provide them to the right quality.

SPACE
- Is space used as effectively as possible?
- How could you use it :
  - at less cost ?
  - for better workflow ?
  - to give better image?
  - to produce more pleasant surroundings.

TIME
- How quickly do you get things done ?
- How to improve turn-round time ?

EQUIPMENT
- How cost effective is it ?
- How well utilised is it ?
- How could you reduce its cost ; improve its quality ; improve its utilisation ?

-Corporate planning.
-Budgeting.
-Project planning.

-Staff planning.
-Target setting.
-Staff appraisal.

-Staff development.
-Delegation.
-Coaching.

What are you doing to :
- PLAN for the future?
- DEVELOP your staff & your department to achieve your plans?

ORGANISING
- Creating the structure & procedures which enable the organisation's plans to be implemented.

THEORIES OF MANAGEMENT

- What is management ?
- What is the role of the manager ?
- What management styles can he use ?
- What motivates people ?
- How can he handle himself ?

7.39 – 7.50 Planning time

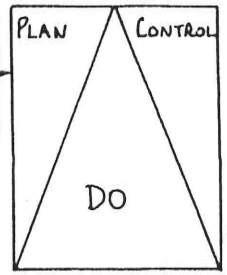
7.26 – 7.29 Gp Behaviour

7.05 – 7.07 Motiv^n. of People

8.05 Managerial Styles

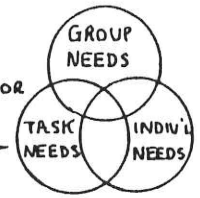
WHAT IS MANAGEMENT ?

- Using resources as effectively as possible
- Working through others
- Satisfying conflicting needs.



SENIOR EXECUTIVE

OPERATOR



ROLE OF THE MANAGER

- Organisation
- Communication
- Getting things done

ORGANISATION

Establishing the structure & the planning & control procedures which enable the organisation's plans to be implemented.

COMMUNICATION

Sharing of information, attitudes & feelings to create an atmosphere in which people will :-

- want to implement company policy
- be able to implement the policy

PETER PRINCIPLE

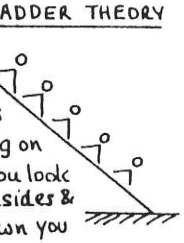
'Every manager rises to his level of incompetence He is promoted until he cannot do his job & there he stays.'

GETTING THINGS DONE

Avoid the problems arising from :-

- lack of trust & fairness
- lack of motivation
- individual's needs for STATUS & PROTOCOL
- the 'want' for CONTROL
- insufficient time to manage
- lack of staff

LADDER THEORY



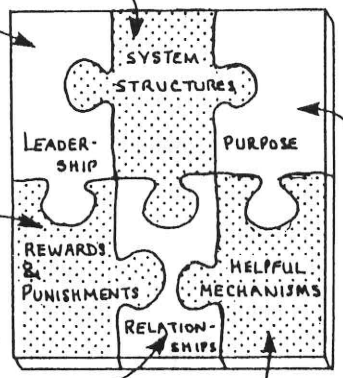
'Management is like men standing on a ladder. When you look up you see backsides & when you look down you see brains.'

STRUCTURES of the SYSTEM

- How is work divided out?
- What comm^n style is used?

LEADERSHIP

- Who is responsible ?
- How are problems solved?
- Who is enthusiastic ?



REWARDS & PUNISHMENTS

- What are people rewarded for ? Causing no trouble ? Improving output ?
- What are people punished for ? Getting things wrong? Rocking the boat!

RELATIONSHIPS

- What hierarchy - formal & informal ?
- What concerns, problems & politics?
- What norms? How is conflict handled?

HELPFUL MECHANISMS

- How are the parts of the system integrated ?
  - management info^n.
  - Consultation & meetings

PURPOSE OF THE SYSTEM

- What is it trying to achieve ?
- What does it get from the environment ?
- What does it provide to the environment ?

MANAGEMENT PROBLEMS

- The ICEBERG model
- The JIGSAW model
- The ONION model.

THE ONION MODEL

Problems are perceived at different levels.....

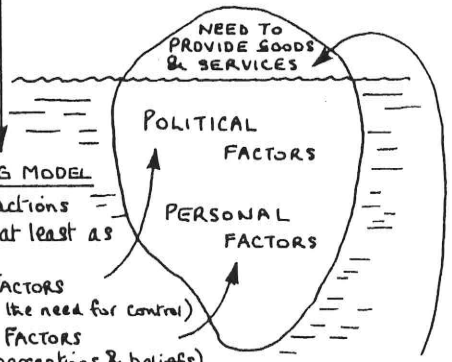
- Top level – Presented problem
  – Business problem, symptoms & causes.
  – System to blame.
- Next level – blaming them
  – how are they contrib^g to the problem ?
- Third level – own contribution to the problem. How can I help ?

THE ICEBERG MODEL

Peoples reactions are affected at least as much by ...

- POLITICAL FACTORS (Power, status & the need for control)
- PERSONAL FACTORS (Hopes, fears, perceptions & beliefs)

...as they are by the need to provide goods & services.



THE MANAGER AS LEADER

* What is management ?
* What problems do managers face ?
* What is leadership ?
* How can a leader be more effective ?

THE MANAGER'S ROLE
- Organisation
- Communication

ORGANISATION. Establishing the structure and planning & control procedures which enable the organisation's policy to be implemented.

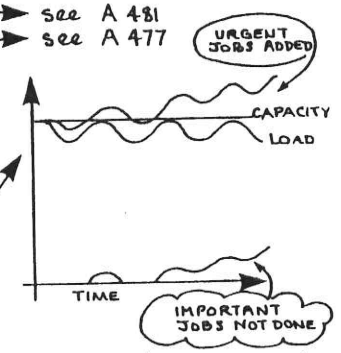
COMMUNICATION. Sharing of inform^n, attitudes & feelings to create an atmosphere in which people will :-
- want to implement the policy,
- be able to implement the policy

ORGANISATION PROBLEMS
People's actions are affected as much by political factors (e.g. power, status, need for control) & personal factors (eg. hopes, fears, perceptions & beliefs) as they are by the requirements to provide services or goods.

MANAGERS' PROBLEMS
- Organisation problems.
- Communication problems.

ORGANISATION PROBLEMS arise in any organisation due to :-
- status & protocol.
- trust & the need for control.
- setting objectives & measuring results.

see A 481
see A 477



LEADERSHIP by LAO TZU

A leader is best when
people barely know he exists,
Not so good when people
obey and acclaim him,
Worse when they debase him.
Fail to honour people and
they fail to honour you.
But of a good leader who
talks little,
When his work is done,
his aim fulfilled,
They will all say,
"We did this ourselves."

LEADERSHIP
Achieving results through people by :-
- SENSITIVITY to their wants.
- INSPIRATION in one's ideas.
- AUTHENTICITY in one's actions.
- RECOGNITION of their NEEDS.

COMMUNICATION PROBLEMS are usually the result of :-
- insufficient time to communicate.
- lack of motivation.
- lack of staff abilities

MOTIVATORS (PROF. HERZBERG)
- Achievement & growth at work.
- Recognition & responsibility.
- Meaningful & interesting work.

THEIR NEEDS
- Recognition of their POTENTIAL.
- Growth in their ABILITIES.
- Advancement in their WORK.
- Reward for their EFFORTS.
- Achievement from their LIVES.

ABILITIES :- areas needing development

MORE EFFECTIVE LEADERSHIP through :-
- Developing your subordinates
- Developing yourself

DEVELOPING SUBORDINATES
- The more effective your subordinates are, the better the manager will be perceived to be managing.

DEVELOPING YOUR SUBORDINATES
- At work
- On courses
- At home

DEVELOPING YOURSELF
- Developing your sensitivity.
- Developing your creativity.
- Organising your time.
- Improving your communication abilities.
- Improving your ability to develop your subordinates.

PAPERS :-
A 481 - Organisation - Historical quotation from 210BC
A 477 - O. & M. Report on the Royal Festival Hall (Joke)

	COMPREHENDING CONCEPTS	MEMORISING	USING SKILLS	LEARNING PROCEDURES	CHANGING ATTITUDES
DELEGATION	*	*	*	*	*
COACHING	*	*	*	*	*
COUNSELLING	*				*
MGT. COURSES	*	*	*	*	*
SELF-MGT. COURSES	*	*	*		
TECHNICAL COURSES	*	*	*	*	
TEAM-BUILDING COURSES					*
GROUP DISCUSSIONS	*		*		*
READING	*	*	*	*	*
CORRESPONDENCE COURSES	*	*	*	*	*

MANAGERIAL STYLE (or how a manager gets results)

A manager's style depends upon :-

* Different perceptions of staff motivation.
* Different uses of authority & freedom.
* Different orientations to job as manager.
* Different types of organisation.
* Different needs of the organisation.

STAFF MOTIVATION

- TAYLOR - "Scientific Mgt." (1911)
- MACGREGOR - "Theory X" & "Theory Y"

SCIENTIFIC MANAGEMENT

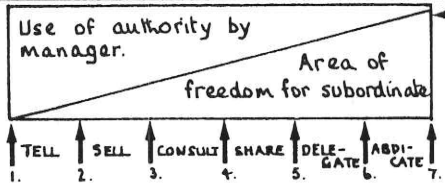
- In any organisation there is a large group of people who are - lazy,
  - undisciplined,
  - need incentives
  - have irrational feelings, &

a smaller group are self-disciplined & rationally motivated .....so org^{n} must be controlled on SCIENTIFIC lines.

- centralise authority, &
- separate planning from doing.

PROPORTION OF AUTHORITY & FREEDOM

- TANNENBAUM & SCHMIDT's (continuum of leadership behaviour)



1. Tell them.
2. Tell & sell it to them.
3. Tell & talk about it.
4. Tentative decision & talk
5. Problem - talk & manager decides.
6. Mgr. gives limits; all discuss, group decides.
7. Mgr. gives limits; group discusses & decides.

THEORY X & THEORY Y

"Managerial style" depends upon the manager's theory about man's motn to work.

THEORY X	THEORY Y
Most people are lazy, - unable to discipline - unambitious, - unable to control their They prize security & shirk responsibility. So they must have external incentive & be told what to do.	All people ..... - find work natural, - accept self discipline, - like commitment. So they can only realise their full potential if they are allowed to use their imagination & creativity.

TYPES OF ORGANISATION

- BURNS & STALKER - (mechanistic or organic ?)
- Principles of organisation
- Span of control.

NEEDS OF ORG^{N}

- TRISE - (socio-technical system)
- MAYO - (Hawthorn experiment)

SPAN OF CONTROL

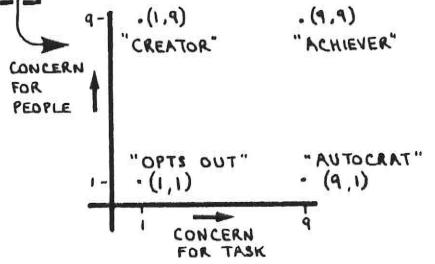
- The number of persons who can be controlled by one person is dependant upon :-
  - complexity of work,
  - degree of responsibility,
  - ability of the person,
  - ability of the staff,
  - facilitn for communication.

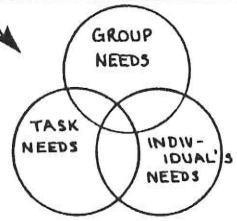
PRINCIPLES OF ORGANISATION

- The relationships between people in the organisation must be understood :-
  - direct responsibilities,
  - functional responsibilities,
  - lateral relationships,
  - staff relationships.

MANAGERIAL ORIENTATION

- BLAKE & MOUTON - managerial grid.
- ADAIR - action centred leadership.
- REDDIN - 3D Grid.





ACTION CENTRED LEADERSHIP

- Groups have three areas of need which interact & must each be satisfied.

HAWTHORN EXPT.

- "In org^{ns} where change is made, the nature of the change can have very much less effect than the way in which the change is made."

SOCIOTECHNICAL SYSTEM

- Any change in an organisation must be planned in sympathy with :-
  - its technical system,
  - its social system
  - the economic climate.

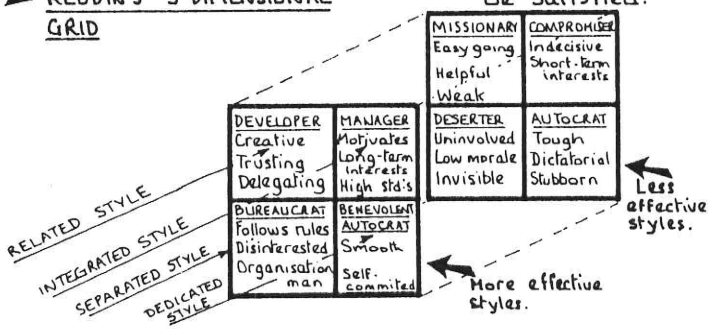
TYPES OF SOCIAL SYSTEM

- Organisation - paternal, military or informal.
- People - consider their expectations; intelligence; knowledge; level of commitment; ability to feedback; etc.
- Leader - consider his need for acceptability, predictability & control.

MECHANISTIC & ORGANIC

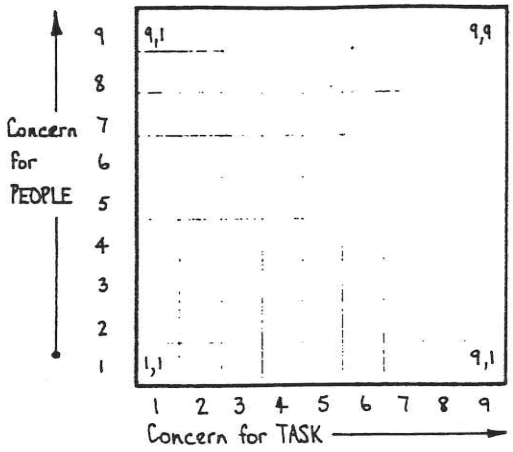
- The degree of rigidity or participation required in an organisation is controlled by its :-
  - size,
  - level of technological change,
  - degree of market change,
  - preferred management style.

REDDIN'S 3-DIMENSIONAL GRID



MANAGEMENT STYLE

A summary of ideas from Blake & Mouton Grid & the Reddin 3D grid.



B. & M. Grid

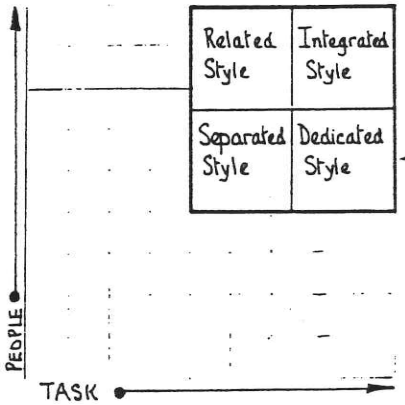
All managers could be fitted onto the grid according to their management style from the one who 'OPTS OUT' (Co-ordinates 1,1) to the 'ACHIEVER' (9,9)

MANAGERS can be :
- Tested to see where they 'fit',
- trained to improve their position. (move up the S.W/N.E. diagonal)

EMPHASISE the need to be concerned about PEOPLE as well as the TASK.

PAPER :-
A 4b6 - The MANAGEMENT GRID

HOWEVER Concern for just task & people neglects the change in balance which may occur with TIME and differing ORGANISATION NEEDS, NORMS & EXPECTATIONS.

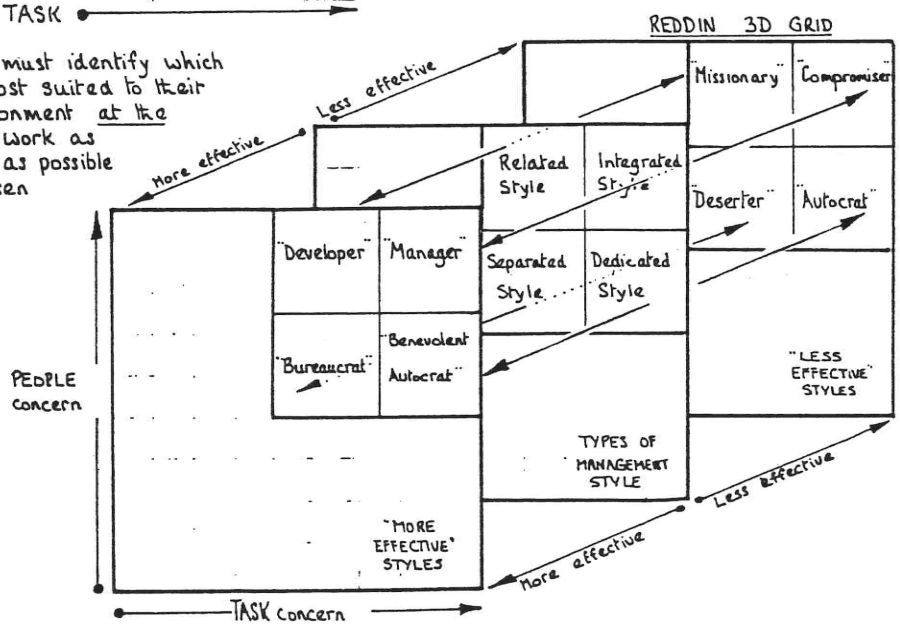


REDDIN identified different management styles within this concern for people and task.

For each style there is an individual spectrum ranging from "MORE-" to "LESS-EFFECTIVE" styles depending upon the :-
- Norms existing in the work environment,
- Changes in organisation's needs with time,
- Changes in expectations of bosses, peers & subordinates.

Managers must identify which style is most suited to their work environment at the moment & work as effectively as possible in the chosen style.

REDDIN 3D GRID



Managerial Strengths & Weaknesses

- Ability to work with others
- Ability to manage self
- Ability to create ideas
- Ability to accept risk
- Ability to implement change

Working with others

- Enthuse & get commitment.
- Channel effort.
- Deal with personality clashes.
- Listen to & use their ideas.
- Work with - your boss.
  - your colleagues.
  - your subordinates.

Managing self

- Clarity of thought.
- Channel own effort.
- Motivation by NEED for ACHIEVEMENT.
- Giving the right attention to detail.
- Singlemindedness.
- Ability to wait.

Ability to implement change

- Ability to plan & control.
- Ability to work with people.

Creating ideas

- Originality of thought.
- Imagination.
- Uninhibited.

Accepting risk

- Need for progress.
- Acceptance of RISK of FAILURES
- Self assurance.

THE ROLE OF THE MANAGER

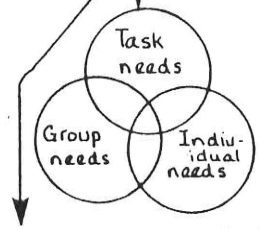
* What is management's role ?
* What knowledge, skills & attitudes are required to fill this role ?

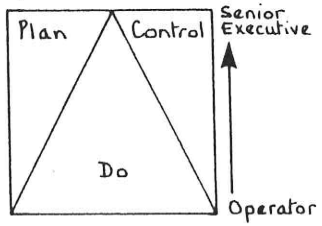
MANAGEMENT'S ROLE

- Managing oneself
- Managing people
- Managing resources

MANAGEMENT'S ROLE

- Satisfying conflicting needs
- Planning, doing & controlling
- Self management
- Communicating





KNOWLEDGE REQ'D
(Knowledge from own & other people's experience.)

SKILLS REQUIRED
(Acquired & developed by oneself.)

ATTITUDES REQ'D
(Developed by experience)

RESOURCE MANAGEMENT

Knowledge of :-
- Task aims,
- Resource needs,
- Organisation systems & policy,
- External suppliers & services.

Skills :-
- foresight & planning,
- sense of judgement & evaluation,
- organisational ability,
- problem solving ability,
- assessing priorities,
- skill in controlling

Attitudes :-
- a balance between TASK : PEOPLE
- committed to AIMS
- questioning

PEOPLE MANAGEMENT

Knowledge of :-
- People in general, (motivation & industrial psychology)
- People as individuals,
- Laws, procedures & policies.

Skills :-
- Communication
  - listening & interpreting.
  - briefing & informing.
- Motivation
  - Supporting & counselling.
  - persuading.
  - enthuse & inspire confidence.
- Training & development
  - coaching.
  - delegation.
- Staff selection

Attitudes :-
- caring & sympathetic,
- loyalty to staff & organ?
- approachable.
- flexible & adaptable.

SELF MANAGEMENT

Knowledge of :-
- Own strengths,
- Own weaknesses,
- Self imposed constraints.

Skills :-
- Ability to assess priorities.
- Saying 'No',
- Ability to plan work,
- Ability to take decisions,
- Ability to deal with more than one problem at once.

Attitudes :-
- self disciplined,
- wanting to get things done,
- drive & enthusiasm,
- tact & diplomacy,
- fearlessness.

SELF MANAGEMENT
- Managing time.
- Monitoring progress.
- Delegation.

COMMUNICATING
- Listening.
- Thinking.
- Speaking & writing

PAPERS :-

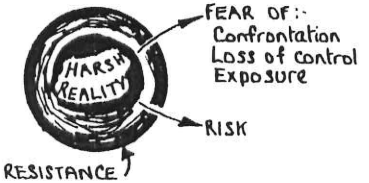
A 656 - The role of Management

DEALING WITH RESISTANCE

* What is RESISTANCE ?
* Why remove resistance ?
* What form does resistance take ?
* How to deal with resistance

RESISTANCE

- A way of avoiding looking at reality.
- Resistance grows if resisted.



REMOVING RESISTANCE

- Until resistance is removed, people won't change their behaviour.
- Removing resistance is a part of the education process.

WAYS OF RESISTING

- Attack.
- Silence.
- Detail.
- No time.
- Surface compliance

ATTACK
- Don't take it personally, because
- People avoid reality by rejecting anyone who tries to get them to look at it.

SILENCE
- Thoughts & feelings bottled up.

DETAIL
- "Did you speak to ....?"
- Seeks the history of the event.
- Lots & lots of data.

NO TIME
- Impatience.
- Change the subject.
- Come back later.

SURFACE COMPLIANCE
- Stores up resentment.

DEALING WITH RESISTANCE

- Pick up resistance cues.
- Give two 'good faith' responses.
- Name the resistance.
- Keep quiet.

RESISTANCE CUES

- Resistance evident when:-
  - conversation repeats,
  - you get angry or bored,
  - you note non-verbal cues.
- Identify the form of the resistance.

KEEP QUIET

- Let him express his reservations. This is the only way in which he will let them go.
- Use non-verbal attending ploys to encourage him to continue.
- Avoid rational argument with persons not wanting to rationalise & who behave irrationally. They do not want to face reality.

'GOOD FAITH' RESPONSES

- In answer to questions - try to give 2 responses of fewer than 5 sentences.

NAME THE RESISTANCE

- Be disarming.
- Name the form the resistance takes in neutral, non-aggressive language.

NAMING THE RESISTANCE

- Attack "What are you angry with me for?"
- Silence "Have you no reservations about what I am saying?"
- DETAIL "What do you need that detail for?"
- NO TIME "Do you really want to spend time on this?"
- COMPLIANCE ..... as with SILENCE. If still no resistance, "If you did have reservations, what would they be?"

WORKING WITH YOUR SECRETARY

* Delegating work
* Motivation

DELEGATING WORK

- Typing.
- Filing & office systems.
- Self management.
- Client contact.
- Personal assistance.

TYPING

- Using live dictation.
- Using tape recordings.

MEETINGS FILING & OFFICE SYSTEMS

- Filing & retrieving materials.
- Filling-in forms, returns.
- Designing personal & office systems.
- Improving & using office equipment.
- Meetings - organising,
  - agenda,
  - minutes.

SELF MANAGEMENT

- Controlling time - keeping diary,
  - recording time,
  - making appointments.
- Planning time - helping with time allocation.
- Helping with work load -
  - reminding & bringing up items,
  - preventing interruptions,
  - assisting at meetings.

CLIENT CONTACT

- Letters - replying to clients.
- Telephone - calling clients,
  - answering Q's,
  - intercepting calls.
- Meeting clients :-
  - receiving them,
  - arranging meals, taxis, etc.
  - discussing problems.

MOTIVATION

- Showing appreciation.
- Involvement.
- Job enrichment.
- Building confidence.

APPRECIATION

- Saying 'thanks'
- Praising good work & initiative.
- Treat kindly & courteously.
- Presents & lunches
- Flexitime & time off.
- Show interest in family/personal concerns.

BUILDING CONFIDENCE

- More trust & involvement.
- More feedback.
- More responsibility.
- Growing abilities.

JOB ENRICHMENT

- Growth in opportunities.
- Growing in the job.
- Growth through training & delegation.

INVOLVEMENT

- Attending meetings.
- More feedback on jobs.
- Reading & attending to letters & memos.
- Requesting an opinion occasionally.

PERSONAL ASSISTANCE

- Organising functions
- Helping with personal problems.
- Helping with ideas
- Helping with projects
- Deputising

ORGANISING FUNCTIONS

- Lunches; conferences; parties; outings; etc.

PERSONAL PROBLEMS

- Hotel bookings, travel, tickets, etc.
- Anniversary reminders, presents, etc.
- Personal appointments (medical; garage;)
- Care of desk equipment.

DEPUTISING

- Attend meetings & report back.
- Attend courses/conferences & produce resume'.

HELPING WITH PROJECTS

- Finding contacts/experts.
- Getting financial & market info".
- Managing/overseeing printing, etc.
- Collecting; collating; summarising info".

IDEAS

- A sounding board.
- Collecting info".
- Researching info".

Issue 2

COACHING

* What is coaching & why coach ?
* How to coach ?
* Skills needed in coaching
* Do you coach enough ?

WHAT IS COACHING ?

- Development at work in which.....
- Problems are turned into learning situations..... in a
- Planned way.....under
- Guidance.

WHY COACH ?

- To develop staff.
- To use experience more fully.
- To develop specific skills.
- To change particular attitudes.
- To reinforce areas of knowledge.
- To share experience & expertise.
- To develop the boss

TO DEVELOP STAFF

- People are a vital resource.
- People want to develop.
- People need to develop to do difficult, challenging work.
- People want to share in making it happen.

TO DEVELOP THE BOSS

- Manager learns too.
- Delegation becomes easier.
- Increased capability of department.
- More chance of promotion.
- Satisfaction from helping people to grow.

DO YOU COACH ENOUGH ?

- Do you plan your coaching ?
- Who is your deputy ?
- When next ?
- How long do you spend per annum ?
- What benefits has your coaching produced ?

SKILLS NEEDED IN COACHING ?

- Listening
  - To words, tones & behaviour.
  - To increase trust ask opinions & don't tell them.
  - paraphrase.
- Building
  - build on his ideas.
  - use positive response.
  - avoid reproach.
  - seek opinions.
  - build on his experience.
- Perception
  - recognise the effect of climate.
  - recognise the effect of management styles,
  - consider history of relationships & expectations.

HOW TO COACH

- Identify opportunities. What do you want to achieve ?
- Recognise targets. How will you know when the change is accomplished ?
- Plan timing. How long to achieve the change ? Agree each step & progress reporting.
- Agree tactics. How will you go about it ? Who will be involved ? What methods will be used ?
- Monitor progress. How will you recognise progress ? How can you measure it ?
- Review.
  - What progress is made in task & in learning ?
  - Consolidate learning with more challenging tasks using skills.
  - Give feedback.

RECOGNISE OPPORTUNITIES

- Increase - commitment,
  - loyalty,
  - confidence,
  - performance,
  - scope.
- Remove weakness.
- Consider task & development needs.

RECOGNISE TARGETS

- Change must be within capability & authority.
- Recognise targets from appraisal & job descriptions.

RECOGNISE OPPORTUNITIES

- Is there an aspect which both boss & subordinate wish to improve ?

PLAN TIMING

- Agree each step.
- Agree right step size

MONITOR PROGRESS

- Balance accountability against need to learn from experience.
- Plan for systematic, agreed reporting back.
- Encourage thoughtful responses.

AGREE TACTICS

- Gain commitment by asking opinions - not by telling.
- Learner must see where it all fits together.
- Manager gains by seeing situation as staff see it.

FILMS :-
I owe you.
Received with interest.
PAPERS :-
7.36 -Listening
A 609 -Coaching

Issue 2

COUNSELLING

* DEFINITION
* SKILLS REQUIRED
* TECHNIQUES
* GROUND RULES

DEFINITION OF COUNSELLING

• A meeting of 2 people (generally) in which one person is encouraged to take responsibility for a problem or for improving a situation.

COUNSELLING

- Getting the person to understand how they are contributing to the problem & what they can do now.

SKILLS REQUIRED

• Listening
• Supporting
• Structuring the meeting

LISTENING

- Sensitivity to other people:-
  - their needs,
  - their wants. Do they want ideas?
  - their emotions. Is their emotional state right?
  - your effect upon them. How does your interest affect them?
- Do not blindly accept the PROBLEM as stated.

SUPPORTING

- Encourage a trusting atmosphere. (Confidential)
- Encourage a supporting atmosphere:-
  - reassurance,
  - openness,
  - non-threatening.

STRUCTURING THE MEETING

- Get the person to look realistically at the factors.
- Get the person to look deeper into the problem. It may be discussed at one level (the safe assumed problem level) while the real problem is not mentioned & forms a 'HIDDEN AGENDA'.

TECHNIQUES USED IN COUNSELLING

• Paraphrasing
• Questioning
• Time in 'here & now'
• Silence
• Psychologising

PARAPHRASING

- To give both parties a better insight into the points made & the ideas behind them.

QUESTIONING

- Questions can threaten but can steer the discussion. Try giving response/steer which gives the good points of the situation before exploring the problems (opportunities)

SILENCE

- Silence can encourage the other person to continue talking.

TIME IN 'HERE & NOW'

- Work in 'HERE & NOW' to avoid recriminations & to give a positive response about what should be done.

GROUND RULES

• Time
• Notes
• Environment
• Non-judgemental

TIME

- Be generous, > 1 hour

NOTES

- Taking notes destroys feelings of confidentiality.
- Make notes later if they are necessary.

NON-JUDGEMENTAL

- Don't give opinions but get the other person to provide their own. This increases their involvement & the likelihood of action.

ENVIRONMENT

- Interruptions; avoid telephone & people interruptions.
- Time of day; at the convenience of the counsellee.
- Place; comfortable, informal, & quiet.

PAPERS :-
A.361 & 6T2 - COUNSELLING
5.02 - INTERVIEWING
5.04 - QUESTIONING AT INTERVIEWS

TARGET SETTING & APPRAISAL

* Job Clarification
* Target Setting
* Review
* Annual Appraisal

JOB CLARIFICATION
- How do I see my job?
- What does my boss expect of me?
- Where does my job fit into the organisation? (with particular reference to my boss's job.)

TARGET SETTING
- How well should I do my job?

REVIEW
- How well am I getting on?

ASSESSMENT
- How well does my boss think I am doing?
- How well do I think I am doing?

ANNUAL APPRAISAL
- Assessment.
- Target setting & job clarification.

ANNUAL APPRAISAL
- A formal system in which performance is compared with targets once a year to help both the organisation & the individual.

ADVANTAGES
- To the individual.
- To the organisation.

INDIVIDUAL BENEFITS
- Self management
  - set priorities / planning.
  - problem recognition earlier.
- Motivation
  - feeling involved.
  - better communication.
  - better relationships.
- Training & development

TO THE ORGANISATION
- Manpower planning
  - recruitment & selection
  - lateral transfers
  - management succession
- Staff training & dev't.
- Staff motivation.
  - clarified priorities,
  - improved perception of the organisation,
  - greater commitment.

.... also
- Organisational dev't.
- Job evaluation.
- Team building.

REVIEW
- An informal & ongoing process to help me update my job & targets.
- Subordinate alone or with boss.
- At least 4 times each year.

TARGET SETTING & JOB CLARIFICATION
- How can we improve our performance?
- Where are we going now?

TARGET SETTING
- What is a target?
- Why set targets?
- How should targets be set?

WHAT IS A TARGET?
- Something to aim at.
- The standards for each task.
- A guide for action.
- Priorities above routine work

WHY SET TARGETS?
- To help the organisation:-
  - achieve its objectives,
  - communicate,
  - appraise its staff,
  - plan & control.
- To help the individual:-
  - have direction / commitment,
  - communicate / paraphrase,
  - know how well they're doing
  - manage their time better.

HOW SHOULD TARGETS BE SET?
- Ground rules.
- Features.
- Format.
- Process.

PROCESS
Define the target.
List the constraints & influences.
Set standards.
Decide on ACTION PLAN

SET STANDARDS
- a continuing yardstick for judging acceptable progress.
- leave room for improvement.

in ....quality standards, quantity standards, time standards, cost standards.

LIST CONSTRAINTS
- rules & reg^{s}.,
- security,
- resources,
- time,
- people, etc.

ACTION PLAN
- "I WILL GO AND DO ....."

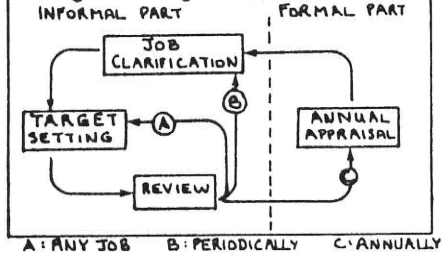
GROUND RULES
Not too many at once (<12)
Set by subordinate with boss.
Hard enough / not too hard.
Reviewable / not too rigid.

FEATURES
Measurable & quantifiable.
Definable.
Dated & updated.
Challenging.
Realistic & achievable.

FORMAT
- TO ..... (do something measurable, quantifiable & definable)
- BY ..... (date & update)
- IN ORDER TO .... (do something challenging, realistic & achievable).

JOB CLARIFICATION
- List the "purposes" of the job
  - 4 to 6 key tasks
  - the most important jobs done
- What is the department here for?
  - what are the main divisions of work?
- What makes it a success or failure?
  - what are the most important tasks?
- What major contributions can I make?

Target Setting & Appraisal Process



A: ANY JOB B: PERIODICALLY C: ANNUALLY

PAPERS:-
A 35 - Objective setting for mgt. appraisal.
A 150 - Mgt. by Objectives
FILM - 'How am I doing?'

THE APPRAISAL INTERVIEW

* Preparation
* Interview
* Summary
* Objectives

PREPARATION

* See what's happening
* See where you are now
* See where you're going

WHAT'S HAPPENING ?

- Look back at previous appraisals & career progress.

WHERE ARE YOU NOW ?

- Look at the job description & current activities.

WHERE ARE YOU GOING ?

- How does the manpower plan affect you ?

INTERVIEW

* Listen to evidence
* Discuss diagnosis
* Face up to problem areas
* Agree plan of action

LISTEN TO EVIDENCE

- Concentrate on facts
- Tell / Tell & Listen / Counselling ?

DISCUSS DIAGNOSIS

- Problem discussion ≠ criticism

FACE UP TO PROBLEM AREAS

- Counselling - interviewee must recognise his problem areas if he is to do anything about them.

AGREE PLAN OF ACTION

- Set targets.
- Plan progress reports.
- Plan training.
- Plan development.

SUMMARY

* Write up...
  - report of the interview.
  - record any warnings, etc.

OBJECTIVES OF APPRAISAL

- Talk with the boss - is he happy with my performance & potential?
- Boss to subordinate - is he happy in his/her present job & with his present prospects?
- Helps motivate subordinates to develop themselves.
- Helps in planning future development & training.
- It is NOT a salary review.

FILM :-

How am I doing ?

PERFORMANCE APPRAISAL

* What is performance appraisal ?
* Analysing performance & interview preparation
* Conducting an appraisal interview
* Obtaining the maximum benefit (interviewee)

PERFORMANCE APPRAISAL

- Definition
- Job descriptions

DEFINITION

- Performance appraisal involves getting closer to understanding the individual employee to
  - ensure they know what is req'd of them, & know
  - how they are succeeding in their jobs.
  - to enable the manager to know each of their staff better, & so
  - help them achieve more.

Help clarify what is required of employee but regular & systematic reviews help by...
- identifying training needs,
- reviewing J.D's in light of possibly changing circumstances.
- identifying promotion potential,
- possibly suggest merit increments for a salary review.

Such interest in one's staff could
- increase motivation.
- demonstrate concern for individuals.
- stimulate / improve performance.
- offer a channel for feedback

ANALYSING PERFORMANCE

- Consider the employee's
  - personal history sheet,
  - job description.
  - summary of training.
  - review past performance targets.
  - identify potential training needs.
  - use review to shape future targets

CONDUCTING THE INTERVIEW

- The normal precautions & interview courtesies apply.

THEN....

- outline the shape of the interview & its purpose.
- use open, reflective questions.
- use listening techniques to encourage interviewee to talk.
- summarise & make brief notes.
- set goals jointly & agree action-plan.
- summarise & close the interview.
- follow up any promises, actions, etc. and maintain communication & interest.

INTERVIEW PREPARATION

- 2 weeks before appraisal ask them to
  - Consider the PAST in terms of
    - their successes,
    - their problems, and their causes,
    - what they enjoyed,
    - what they did not enjoy
  - Consider the FUTURE in terms of
    - where the section should be going,
    - their own aims (short term),
    - what help/training they need,
    - their own aims (long term).
    - any other points for discussion.

OBTAINING MAX. BENEFIT

- Do not view appraisal as threatening.
- Appreciate the inherent opportunities it offers — To clear misunderstandings, to discuss salaries, change roles or job content ?
- Analyse your own performance — Be clear about your criteria for judging success.
- Think hard about what you want to do — alter unproductive practices, change attitudes ?
- Identify ways in which you think you are improving — any private studies, new skills ?
- Give consideration to your action plan so nothing is to be imposed upon you.

Film :- 'How am I doing?' - Video Arts

DELEGATION

* What is it ?
* How should you delegate ?
* What effects does delegation have?
* Barriers to delegation.

WHAT IS DELEGATION ?

- It may be defined as .... "Giving a subordinate the freedom & authority to handle certain matters on their own initiative - with the confidence that they can do the job successfully".

DELEGATION varies in degree from "INSTRUCTION" to "ABDICATION".

'INSTRUCTION' = Telling how to do the job. "DO IT MY WAY"

'DELEGATION' = Telling results required & authority given. "DO IT YOUR WAY & ASK FOR HELP IF IT IS NEEDED"

'ABDICATION' = Abdicating responsibility for job. "DO IT ANY WAY BUT DON'T ASK FOR HELP IF IT GOES WRONG"

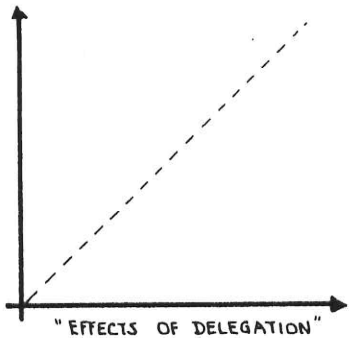
BARRIERS TO DELEGATION

- Bosses barriers include :-
  - lack of trust.
  - fear of losing job.
  - fear of losing face.
  - unnecessarily high standards
    - of quality,
    - in time.
- Subordinates barriers include :-
  - fear of taking decisions due to
    - poor training,
    - little self-confidence,
    - fear of boss.

HOW SHOULD YOU DELEGATE ?

- Before delegation
  - Select the right staff.
  - Train and develop them.
  - Plan what is to be delegated.
- When delegating
  - Tell them
    - what has to be done.
    - why it has to be done.
    - results required & when.
    - what authority is given.
  - Tell others
    - what authority has been given.
- When job is being done
  - check progress at agreed points
  - help only if asked.
- After job
  - give constructive feedback.

WHAT EFFECTS DOES DELEGATION HAVE?



WHAT CAN & CANNOT BE DELEGATED

DELEGATE - Routine jobs & decision taking if :-
- the subordinate can do them better, quicker or more cheaply.
- they can develop the subordinate.
- Complete jobs.

DON'T DELEGATE
- Supervisory functions.
- Organisation of staff development.
- Checking an individual's results.
- Communication to staff.
- Planning & setting of staff objectives.

PAPERS :-
A 103 - Delegation
C 328 - Delegation questionnaire

FILM
'Breaking the delegation barrier'

Issue 3

GETTING THINGS DONE

* Wanting to get things done
* Getting power to do them
* Persuading others to do things

WANTING TO GET THINGS DONE

- Need for "productivity."
- Need for "political factors".
- Need for "control."

PRODUCTIVITY

- Organisation's needs - profit output & reduced costs.
- Group's needs - solidarity.
- Individual needs - security & wealth.

POLITICAL FACTORS

- Power & influence
- Prestige & status
- Respect

CONTROL

- Fear of surprise; chaos; losing face.
- Love of orderliness.

WANTING TO GET THINGS DONE

- These wants are affected as much by political factors & need for control as they are by the need to provide goods & services.

PERSUADING OTHERS TO GET THINGS DONE

- Influencing styles
- Influencing "tools"

INFLUENCING STYLES

- Push styles = Moving (Doing it because you have to.)
- Pull styles = Motivating (Doing it because you want to.)

PULL STYLES

- Recognising & involving
  - Bringing in,
  - Listening / paraphrasing.
- Personal disclosure
- Generating a shared identity
  - Common hopes, aspirations, & values.
- Showing exciting possibilities
  - Future & emotional.
- T.A. "nurturing parent"
- T.A. "curious child" "free child".
- Creep.

INFLUENCING TOOLS

- Don't sell solutions - market ideas ("How to....)
- Use positive response (3 reasons why you like an idea before shooting it down)
- WIN : WIN not LOSE : LOSE

GETTING POWER TO DO THEM

- Types of power & auth'y.
- Problem ownership
- Constraints on power.

CONSTRAINTS ON POWER

- Direct & indirect power.
- Real or Imagined constraints.

REAL & IMAGINED CONSTRAINTS

- If constraints are examined, they are frequently found to be imagined.

PUSH STYLES

- Offering rewards
- Threatening punishments.
- Proposing & logical reasoning
- T.A "critical parent/ nagging"
- T.A. "rebellious child"

DIRECT & INDIRECT POWER

Direct power from:-
- an ability to act,
- doing it yourself.

Indirect power from:-
- power from words.
- persuasion, coercion & convincing.

INDIRECT power (I wish they would...) can sometimes be turned into DIRECT power by:-
- analysing the benefits "if they did"...
- looking for the direct power in the form of "I wish I could...."

PROBLEM OWNERSHIP

- People are only motivated to solve a problem if :-
  - they own the problem,
  - they own the solution.
- People are frequently in the position where :-
  - they don't recognise the problem,
  - they don't want to recognise it,
  - they don't want solutions.
- People sometimes recognise the problem but don't want to solve it. (Isn't it awful?)
- Check out - "Is help required?"

TYPES OF POWER & AUTHORITY

- Referent power & personal authority from personal charisma & individual magnetism.
- Legitimate power & structural authority from your position in the organisation.
- Expert power & sapiential authority from knowledge, expertise & wisdom.
- Reward power from your ability to reward, support & give recognition.
- Coercive power from threats, domination, bluff, insecurity & group pressures.
- Moral authority from conduct & habits considered right, just & virtuous
- Dynastic authority from blood or social connections.

USING POWER & AUTH'Y

- Use a combination of types.
- Vary their use with different people; situations; times; circumstances.

INFLUENCING STYLES (How individuals get results)

* METHODS USED TO INFLUENCE OTHERS
* A METHOD TO ANALYSE TRANSACTIONS
* PUSH & PULL STYLES

METHODS OF INFLUENCING

- Rewards & punishments.
- Assertive persuasion.
- Participation & trust.
- Common vision.

REWARDS & PUNISHMENT

- Evaluation (+ve & -ve)
- Prescribing goals & expectations.
- Incentives & pressures.

INCENTIVES & PRESSURES

"If we don't do it we will have to part company."

GOALS & EXPECTATIONS

"My aim for where you & I are going is ....."

EVALUATION

+ve - "I like what you are saying"

-ve - "I don't like ....."

ASSERTIVE PERSUASION

- Proposing.
- Reasoning for & against.

PARTICIPATION & TRUST

- Personal disclosure
- Recognising & involving
- Testing & expressing understanding.

PERSONAL DISCLOSURE

to get trust from others

"... I am feeling fragile."

TESTING / EXPRESSING UNDERSTANDING

- Paraphrasing.
- Playing back.

RECOGNISING / INVOLVING

- Bringing in.
- Listening to their point of view.

COMMON VISION

- Articulating exciting possibilities.
- Generating shared identity.

SHARE

- Find common ground.
- Use common values.
- Identify common hopes.
- Give common aspirations.

POSSIBILITIES

- In the future.
- With excitement.
- Include values.
- Using emotions.

TRANSACTIONAL ANALYSIS

- EGO states.
- Transactions.
- Scripts

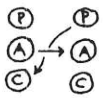
SCRIPTS

- Types : constructive, destructive & non-productive.
- Groups : winners, losers, & non-winners.
- Levels : cultural, organisational & individual.

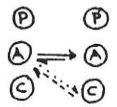
TRANSACTIONS

- Normal

- Crossed



- Ulterior



PUSH & PULL STYLES

- Pull styles - Motivating
  - doing it because you want to.
  - soft track.
- Push styles - Moving
  - doing it because you have to.
  - hard track.

PUSH STYLES

- Rewards & Punishments.
- Assertive persuasion.
- Rebel.
- Critical parent.

PULL STYLES

- Participation & trust.
- Common vision.
- Curious child.
- Creep.
- Free child
- Nurturing parent.

PAPERS :-

A.668 - Transactional Analysis; scripts, egostates, transactions & behaviour

EGO STATES

- Parent — Behaving like a parent → PARENT EGOSTATE subdivides into :-
  - Nurturing Parent (Comforting)
  - Critical Parent (Telling & Judgemental)
- Adult — Logical & Rational
- Child → CHILD EGOSTATE subdivides into :-
  - Adapted child (Demanding-rebel or Creep)
  - Free child (Spontaneous - loving, open & curious)

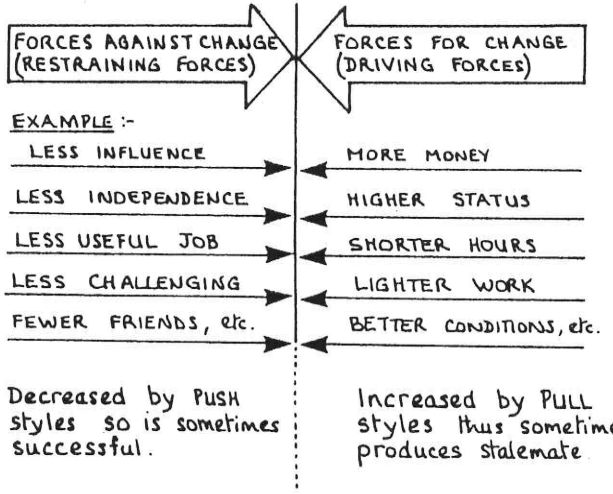
∝ Issue 2

INFLUENCING STYLES

* PUSH Styles.
* PULL Styles.
* Force Field.

FORCE FIELD

Force Field analysis is used to identify forces for & against change which are acting on...
- an individual
- a group .....so that the restraining forces can be removed & the change accepted.



Decreased by PUSH styles so is sometimes successful.

Increased by PULL styles thus sometimes produces stalemate

PUSH STYLES

- Logical reasoning.
- Offering rewards.
- Threatening punishments.

THREATENING WITH PUNISHMENT

- Threatening & using authority.
- Being aggressive - using power.
- Nagging & pressurising & manipulating.

RESULTS
- People want revenge.
- Recipient loses face.

PUSH STYLES

- Forcing the other person to do something
- Moving rather than motivating them.
- Increasing the 'forces for change' 'forces against change' build-up.
- Creates a WIN : LOSE situation.
- Quicker result or no result.
- You cannot use PUSH style then PULL style.

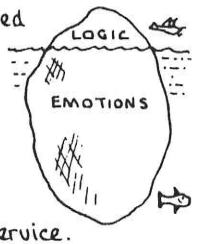
LOGICAL REASONING

- Reasoning for & against.
- Giving objectives & reasons.
- Show problems of not doing it.

LOGICAL REASONING

- Peoples wants are affected at least as much by :-
  - emotions,
  - need for control,
  - political factors.

as they are by :-
- rationality,
- need for production,
- need to provide a service.



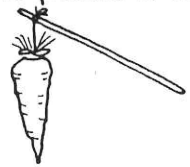
PULL STYLES

- Personal disclosure.
- Involvement.
- Showing exciting possibilities.

OFFERING REWARDS

- Bargaining.
- Bribing

RESULTS
- The reward becomes a right & must be increased to give the same performance level.
- People can feel insulted to be offered a reward.



PERSONAL DISCLOSURE

- Being assertive - "I have a problem."
- Asking for help.
- Reputation for honesty & authenticity.
- Openness.

INVOLVEMENT

- Generating a shared identity.
- Creating a fellow feeling.
- Lobbying - creating a common objective.
- Making people responsible.
- Giving recognition & praise.
- Listening & paraphrasing.

PULL STYLES

- Motivation - creating the situation where the person wants to do it.
- Decreasing the forces against change.
- Insincere PULL styles = manipulation & dishonesty ⇒ rejection

RESULTS
- Commitment ⇒ more effort.
- Higher quality results.
- Possibly slower results & different results.

GENERATING POSSIBILITIES

- Being enthusiastic.
- Sharing hopes & visions.

CREATIVITY

* What is creative thinking?
* What are the barriers to creative thinking?
* How can the barriers be overcome?

CREATIVE THINKING

- Relating things & ideas which were previously unrelated.
- Using the apparently 'irrelevant'.
- Using INTUITION or INSIGHT as distinct from deductive reasoning. (lateral thought)

BARRIERS TO CREATIVE THINKING :-

- Imposed barriers
- Psychological barriers

AVOIDING THE BARRIERS

- Create an atmosphere where creativity is encouraged
- Improving imagination
- Remove psychological barriers
- Improve idea absorbtion
- Questioning everything
- Use techniques for creating ideas

CREATIVE ATMOSPHERE

- Acceptance of :-
  - wrongness,
  - uncertainty,
  - confusion,
  - excitement,
  - fear,
  - lack of logic.

TECHNIQUES

- Brainstorming.
- Spider diagrams.

IMPROVING IMAGINATION

- wishing,
- imaging.

QUESTIONING

- Apply the 'wh'- words
  - Who
  - why
  - what
  - where
  - when
  - which & how

REMOVING PSYCHOLOGICAL BARRIERS

- Accepting barriers exist.
- Understanding "JOHARI WINDOW"

	KNOWN TO SELF	UNKNOWN TO SELF
KNOWN TO OTHERS	1. OPEN	2. BLIND
UNKNOWN TO OTHERS	3. HIDDEN	4. UNKNOWN

IMPROVING IDEA ABSORBTION

- Headlining when talking.
- Key word notes when listening.
- Paraphrasing when uncertain.

PAPERS :-

7.21 - Brainstorming & synectics
7.22 - Synectics
A 350 Thinking
A 639 - Creative thinking
A 661 - Barriers to learning
A 662 - Johari Window

IMPOSED BARRIERS

- Repression of the operations necessary for thinking
- Repression of risk taking
- Training in logic & analysis

TRAINING IN LOGIC

Danger from :-
- only considering the obvious answer.
- an earlier evaluation causing rejection.
- narrower vision resulting from faster thought.

RISK TAKING

Danger from :-
- being wrong,
- failing to conform,
- looking a fool,

Safety in :-
- following routine

THINKING PROCESS

- Wishing for ideas.
- Retrieval of ideas.
- Imaging of ideas in a new area.
- Comparison of solutions.
- Storing new ideas.
- Transforming idea to a visual solution.

PSYCHOLOGICAL BARRIERS

- Perceptual
- Cultural
- Emotional
- Intellectual
- Expressive
- Environmental

ENVIRONMENTAL

- Lack of trust.
- Lack of support.
- Lack of interest.

EXPRESSIVE

- Difficulty in expressing one's ideas.
- Difficulty in understanding other's ideas.

INTELLECTUAL

- Poor info. retrieval.
- Poor info. processing.

EMOTIONAL

- Personal insecurities :-
  - fear of being wrong,
  - not conforming,
  - impatience,
  - fear of ambiguity,
  - love of order,
  - desire for a quick answer.

PERCEPTUAL

- Not seeing the problem.
- Seeing the wrong problem.

CULTURAL

- Cultural pattern of :- GOOD : BAD RIGHT : WRONG
- Restraint on :-
  - imagination,
  - boldness,
  - inquisitiveness.

GIVING & RECEIVING FEEDBACK

Communication on :-
- performance
- effect on other people

To make a person more aware of :-
- what (s)he does
- how she does it

GIVE FEEDBACK ON :-

• Behaviour	not	The Person
• Observation	not	Inference
• Description	not	Judgement
• Sharing ideas & giving info^n	not	Giving Advice
• Exploring Alternatives	not	Providing Answers

GIVING FEEDBACK REQUIRES:-

- Courage
- Skill
- Understanding
- Self respect
- Respect for others

FOCUS ON :-

- Behaviour which can be changed.

CONSIDER :-

- How much feedback to give
- When to give feedback.

THINK :-

- Has feedback been clear?
- Has feedback been accurate?

FEEDBACK .....
must be designed to give
VALUE for RECEIVER
not
RELEASE for GIVER

Paper :-
A383 - Giving & Receiving Feedback

TRANSACTIONAL ANALYSIS (TERMS & STATES)

* Strokes → **STROKES**
  - Everyone has this need for recognition.
  - POSITIVE strokes reinforce one's self-esteem.
  - NEGATIVE strokes don't, but are better than nothing.
  - In transactions, we both give and receive strokes.

NIGYSOB
- "Now I have got you you son-of-a-bitch"
- Feels superior by hurting someone who has made a mistake.

HARRIED EXECUTIVE
- Prevents the other player getting near.

BLEMISH PLAYER
- Makes the other player feel bad.

* Games → **GAMES**
  - Transactions designed to let people give and receive strokes.
  - Games may prevent effective work from being done - only the game is played.
  - Games may be ended by denying strokes to the other player.

GAMES PLAYERS
- Blemish player.
- Harried executive.
- NIGYSOB
- Bear trapper
- Kick me
- I am available

* Emotional Trading stamps → **TRADING STAMPS**
  - The need to feel good
  - And feeling bad

BROWN STAMPS showing :- anger, resentment, guilt.

GOLD STAMPS
- Feeling charitable.
- Giving recognition.
- Acknowledging achievement.

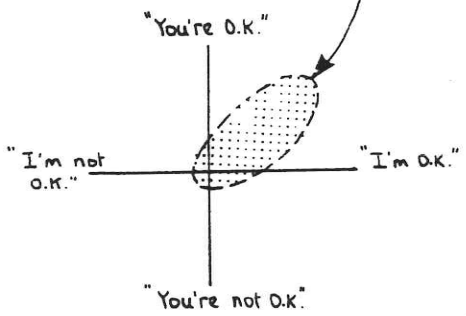
I AM AVAILABLE - to help until you ask & then I will knock you down.

KICK ME
- "Look what I have done now....."

BEAR TRAPPER
- Sets up a situation to catch another out then 'shoots him down.'

* Scripts → Unconscious life plans learned as a child

* Life Positions



* Ego states → **EGO STATES**
  - (P) Parent - for authority figures
  - (A) Adult - logical & objective thinker
  - (C) Child - from emotions e.g. joys & fears

PARENT EGO-STATE
Subdivides into :-
- NURTURING, COMFORTING PARENT.
- CRITICAL, JUDGEMENTAL PARENT.

CHILD EGO-STATE
Subdivides into :-
- ADAPTED, DEMANDING CHILD.
- FREE, SPONTANEOUS CHILD.

* Transactions - Exchange of a "unit of recognition" → **TRANSACTIONS**
  - Complementary - expected response.
  - Crossed - unexpected response.
  - Ulterior - a hidden agenda.

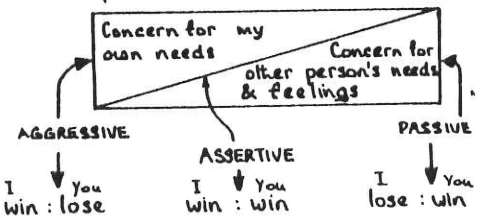
PAPERS :-
A 404 - Transactional Analysis
A 659 - T.A. - A psychological approach to Problem Solving.
A 660 - T.A.
C 380 + 387 - T.A. Exercise
C 432 & 433 - Emotional Trading Stamp Exercise.

ASSERTIVENESS

* What is assertiveness & why use it ?
* Styles of assertion.
* Assertive techniques.

WHAT IS ASSERTIVENESS ?

- PASSIVE BEHAVIOUR
  - non-assertive or apathetic behaviour
- ASSERTIVE BEHAVIOUR
  - getting things done without damaging others.
  - acting on your own rights - without denying others' rights.
- AGGRESSIVE BEHAVIOUR
  - putting the other person down.



STYLES OF ASSERTION

- SIMPLE ASSERTION - "I would like this"
- EMPATHETIC ASSERTION - "I see where you are & need this right away"
- CONFRONTATIVE ASSERTION - "I understood that you would do this & you haven't."
- ANGRY ASSERTION - "I feel very angry about this, I would like you to do that."
- SOFT ASSERTION - "I appreciate that you did that, it made me feel good."
- PERSUASIVE ASSERTION - "I appreciate your problems & wondered if you would do this."

ASSERTIVE TECHNIQUES

- Know when to leave it alone
- Own style.
- Language.
- Work within your abilities.
- Be authentic.

BE AUTHENTIC
- Tell others what you want.
- Receive & give 'positive' comments.
- Take care of your needs. Evaluate & seek clarification of requests of you.
- Confront problem situations A.S.A.P.
- Do not assume.

WORK WITHIN YOUR ABILITIES
- Do not exaggerate your strengths & weaknesses.
- Do not act helpless if you can act independently.

LANGUAGE
- Use "I" statements - avoid 'we' 'one' & 'you'; simple statements - brief & to the point; silence - until you know what you want.
- Do not use - unnecessary lead-in/tag statements; - over explain; - answer manipulative questions; (question, reflect on or summarise questions)

OWN STYLE - find your own style & practice it.

KNOW WHEN TO LEAVE IT ALONE - Do not criticise or help those who do not need/want your help, help those who do not need/want your help.

AGGRESSIVE BEHAVIOUR - what is it ?

- Putting the other person down.
  - hurting,
  - damaging,
  - playing to the gallery.
- "..... you dummy!"
- Anger & acting out feelings.

AGGRESSIVE BEHAVIOUR - why ?

- Lack of other skills.
- Fear/feeling threatened.
- Feelings of powerlessness.
- Over-reaction due to past experiences.

AGGRESSIVE BEHAVIOUR - consequences?

- Immediate - emotional release, - sense of power, - achievement of wants, (- for the present)
- Long run - delayed retaliation.
- Loss of close relations.
- Always defensive.
- Physical illness.

ASSERTIVE BEHAVIOUR - what is it ?

- Acting on your own rights, don't deny others theirs.
- T.A. - rational & adult.
- Allowing your feelings to come out early.
- Sometimes attentive listening.
- Behaving rationally & authentically.
- Expressive feelings.

ASSERTIVE BEHAVIOUR - why?

- Desire to be fair to self & others, - share control/responsibility.

ASSERTIVE BEHAVIOUR - when ?

- Can realistically predict,
- Confident that assertiveness works,
- Assertiveness skills developed,
- Not afraid of revealing yourself or negative consequences.

ASSERTIVE BEHAVIOUR - consequences?

- Self respect & sense of individual identity.
- Affection & respect of others.
- Living as you want to.
- Self confidence.
- Mental & physical health

PASSIVE BEHAVIOUR - what is it ?

- Similar to apathy.
- Putting yourself down.
- Long term - passive' becomes 'aggressive' but not 'assertive'.
- Powerlessness produces 'apathy' & 'aggressiveness' - later.

PASSIVE BEHAVIOUR - why ?

- Mastering ASSERTION for AGGRESSION, PASSIVENESS for POLITENESS, PASSIVENESS for HELPFULNESS.
- Failure to accept personal rights.
- Fear of responsibility.
- Anxiety about negative consequences.

PASSIVE BEHAVIOUR - consequences.

- Loss of - identity, - integrity, - self esteem, - respect for self.
- Depression.
- Physical illness.

EFFECTIVE THINKING

* How is thought influenced by language?
  – by habit?
* What is lateral thinking?
  – brainstorming?
* What obstructs rational thought?
* Should we expect 'black & white' solutions?

IS THOUGHT INFLUENCED BY LANGUAGE?
- Evidence suggests that if words for a concept don't exist, people are incapable of thinking that concept.
- National differences may be influenced by language.
- Politicians often exploit ill-defined words.

IS THOUGHT INFLUENCED BY HABIT?
- Peoples' "attitudes" tend to replace thinking eg. expected views of the manager & union.
- May help us to analyse situations quickly
- Habits may, at times, be a hindrance & wasteful.
- Tends to channel thinking according to background ⇒ problems viewed with bias.

LATERAL THINKING
– produces unusual solutions. Possibly intuition or insight rather than deductive reasoning.

BRAINSTORMING
– usually a group process. (May be individual.)
– problem set & answers invited – quickly recorded without evaluation or criticism.
– if answers stop, wait in silence for more.

WHAT OBSTRUCTS RATIONAL THOUGHT?
- denial,
- projection,
- reaction formation,
- repression
- isolation

'BLACK & WHITE SOLUTIONS?

Some people prefer/expect B/W solutions eg. scientists & engineers. Being in situations having to weigh-up probabilities might disorientate them.

Similarly, persons able to think in terms of likelihoods might find difficulty in commiting themselves to one course of action.

These difficulties present a barrier to rational thinking.

PAPERS:-
A2 Effective thinking & communicating
A350 Thinking

THINKING

* How do people recall information?
* How are people affected by habitual thought?
* How can people improve their creative thought?
* How can people improve their objective thought?

INFORMATION RECALL
- listening
- learning
- memory techniques

HABITUAL THOUGHT
- faster, but
- narrower vision

CREATIVE THOUGHT by
- brainstorming, or using
- thought trees

OBJECTIVE THOUGHT
- Question approach
- Logic approach

I keep six honest serving-men
(They taught me all I knew)
There names are WHAT and WHY
and WHEN
And HOW and WHERE and WHO.
- Rudyard Kipling

THOUGHT TREES
- Spider diagrams.
- Problem trees.
- Decision trees.
- Algorithms.
- Networks.

See papers :-
A2 - Effective thinking & Communicating
A24 - Problem Analysis
A25 - Decision making
A362 - The irrational aspects of d-making
A402 - Project evaluation
A403 - Exponential smoothing
A456 - Decision tree analysis
A480 - Pairs comparison
A583 - Morphological analysis
A585 - Cost benefit analysis
C131 - Domestic electrical products
C132 - Decision trees
C146 - Forecasting
C246 - Problem trees
C293 - Blackened Filament

PROBLEM ANALYSIS
- Recognise problem.
- Specify problem.
- Collect information.
- Identify causes.
- Test causes.

RECOGNISE PROBLEMS
- by deviation from standards
  - FIXED STANDARDS e.g. budgets
  - ASSUMED STANDARDS e.g. performances
  - SUBJECTIVE JUDGEMENTS

SPECIFY PROBLEM
- to limit search for causes.
- to help thought about causes.

COLLECT INFORMATION
- WHY is info? req'd ?
- WHAT info? is req'd ?
- WHERE FROM & HOW?

IDENTIFY CAUSES
- use experience.
- use creative thought.

TEST CAUSES
- would this CAUSE have resulted in that PROBLEM ?

DECISION MAKING
- State aims.
- Identify courses of action.
- Evaluate alternatives.
- Assess consequences.
- Select best course.

STATE AIMS
- to limit possible courses of action.
- to increase objectivity.

IDENTIFY COURSES OF ACTION
- how can we achieve AIMS with RESOURCES in this ENVIRONMENT ?
- apply experience & creativity

EVALUATE ALTERNATIVES
- profit, payback, R.O.I.
- D.C.F., N.P.V. & I.R.R
- decision trees & utility theory
- Monte Carlo simulation
- cost benefit analysis

ASSESS CONSEQUENCES
- effects on people - own staff, suppliers, customers, public.
- benefits & disadvantages, status, morale, motiv'n, health, etc.

SELECT BEST COURSE
- by experience - by consensus
- by weighted scales & pairs comparison

IMPLEMENT SOLUTION
- Communicate.
- Direct.

COMMUNICATION
- briefing
- informing
- supporting

DIRECTION
- planning
- evaluating
- controlling

MANPOWER PLANNING

* ANALYSIS OF CURRENT LABOUR FORCE
* FORECASTING FUTURE MANPOWER NEEDS
* PLANS TO MEET THESE NEEDS

ANALYSIS OF LABOUR FORCE
- Study personnel records
- Staff appraisal

PERSONNEL RECORDS
- What decisions have to be taken ?
- What information is required ?

INFORMATION
What info^{n}. is needed on :-
Employees
- Personal,
- History in Company,
- Qualifications.

Company
- Plans.

Outside
- Training,
- Recruitment.

DECISIONS
Who needs to be moved, & where to ?
Who needs to be trained, how & where ?
Who needs to be recruited & when ?

FORECASTING NEEDS
- Staff supply & demand
- Market effects

MARKET EFFECTS
- Movement of labour to & from the area.
- Competion & wage levels.
- Transport & housing facilities.

PLANS TO MEET THESE NEEDS
- Training & development
- Recruitment

RECRUITMENT
Factors affecting the supply & demand for people :-
- Changing market requirements
  - impact of technology,
  - changes of education levels.
- Changing company requirements
  - larger organ^{n} more complex,
  - changes in shift & holiday patterns
- Changing expectations
  - career dev't & promotion,
  - Increased rewards causing relative change in labour costs.

TRAINING & DEVELOPMENT
To compensate for - technological change ; product changes ; shortage of abilities.....by
- guidance & example from superior,
- experience in different jobs,
- instruction on training courses or by private study.

OPERATOR / CLERICAL STAFF REQUIREMENTS
- Consider :-
  - economic indicators,
  - major customer req'ts.
- Forecast :-
  - manufacturing load,
  - delivery requirements,
  - seasonal fluctuations,
  - clerical load.

(Clerical work measurement)

APPRAISAL
- Why appraise staff ?
  - Staff Audit
  - Staff Development
  - Staff Motivation

APPRAISAL & STAFF MOTIVATION
To enable staff to know :-
- what management thinks of his performance.
- what opportunities are open to them.
- how they can improve their performance.

STAFF AUDIT
For each person & job in the organisation :-
- what is the job now & in 5 years,
- who is in line to fill it?
- are they up to it ?
- who needs special treatment ?

{ Extra fast UP
{ Extra fast SIDEWAYS
{ Extra fast OUT

APPRAISAL & STAFF DEV'T
To improve staff by :-
- identifying shortcomings so they may be improved upon,
- by deciding on future training & development,
- by planning their future career.

MANAGEMENT STAFF REQUIREMENTS		M.D.	DIV'L HEAD	DEP'T HEAD	SUP'T	F'MEN
PRESENT Nº.		1	7	20	55	180
GROWTH REQ'TS		0	1	3	8	24
RETIREMENTS		1	3	6	15	35
WASTAGE %		0	2	11	40	88
SURPLUS / SHORTFALL		1	6	20	63	147
STAFF WITH POTENTIAL	upto 1	-	1	3	6	34
	upto 2	-	-	-	2	11
	upto 3	-	-	-	-	1
GAINS (from promotion)		+1	+3,2 & 1	+6 & 11	+34	?
LOSSES (by promotion)		-	1	3	8	46
NET GAINS (promotion)		1	5	14	26	?
NET REQUIREMENTS		nil	1	6	37	193

JOB	AGE
NAME	PERFORMANCE
SUCCESSOR	POTENTIAL
READINESS	

PAPERS :-
A 51 - Management Appraisal & Development
A 193 - Manpower Planning
A 171 - Personnel recruitment & selection
A 285 - Personnel & training records

C. 153 - Manpower Planning
C. 165 - Getahead Engineering Co.
C. 233 - Training record - info. system design

« ISSUE 2

STAFF PLANNING ORGANISATION & DEVELOPMENT

- Staff Planning
- Staff Organisation
- Staff Development

STAFF PLANNING

- Forecasting manpower needs.
- Staff audit
- Analysis of labour force
  - personnel records
  - appraisal (8.13 - 8.15)

STAFF ORGANISATION

- Organisational relationships.
- Span of control.
- Types of organisation.

STAFF DEVELOPMENT

- Training methods
- Running training sessions
- Self development

SELF DEVELOPMENT

- Self development
- Counselling (8.12)

RUNNING TRAINING SESSIONS

- Training aids
- Structure of a training session
- Giving & receiving feedback (8.21)
- Evaluating training
- Identifying training needs.

TRAINING METHODS

- Methods of training & their applications
- Action learning
- Coaching (8.11)
- Delegation

A 108	Organisational Relationships
A 183	Identifying Training Needs
A 193	Forecasting Manpower Needs
A 383	Giving & Receiving Feedback
A 580	Methods of Trg. & their applications

STAFFING

- Recruitment & Selection
- Interviewing
- Induction
- Staffing

Recruitment

- Definition
- Methods of recruitment
- The advertisement

Selection Procedure

- Definition
- Is there a vacancy ?
- Draw up Job Description.
- Draw up Employee Spec^{n}
- Advertise.
- Application forms.
- Interviewing.
- Testing ?
- Obtain references.

Induction

- Introducing the new employee
  - What does he NEED to know
  - What will You need to know
  - must / should / nice to know
- Where does induction end?
- The union.

Interviewing

- Preparation.
- The interview.
- Questions.
- Procedures.
- Follow up.

Staffing implies

- Manpower planning.
- Manpower control.
- Documentation.
- Personnel records.
- Personal history records.
- Reports, records, statistics.
- Redundancies.
- Knowledge of employment legislation

Recruitment & Selection

- Recruitment is the attraction of a field of possible candidates from whom selection is made.
- Selection is the choice of candidates with the right attitudes & aptitudes to fill the vacancy.

Methods of Recruitment

- Press advertising.
- Internal adverting.
- Friends & relatives of staff.
- Past sources.
- Agencies.
- Visits.
- Other employers' staff.
- Unconventional

Job Description

Employee Specification

Tests

- Current ability
- Aptitude
- Trainability
- Intelligence
- Personality

PERSONNEL RECORDS

- DATA
- INFORMATION STORAGE & RETRIEVAL

PERSONNEL RECORDS

Any personnel record system must be tailored to the organisation:-
- its size,
- its organisation structure,
- its physical layout on-site & geographically,
- its personnel policy, appraisal, etc.
- authorised cost & policy on control data,
- product technology,
- statutory requirements.

DATA

Information on :-
- Recruitment,
- Selection & placement,
- Transfer & promotion,
- Training,
- Work history,
- Health & accidents,
- Performance,
- Discipline,
- Pay.

DATA

Statistics on :-
- Absence,
- Lateness,
- Labour turnover,
- Accidents
- Age distribution

PAPERS :-

A.75 - Method Study O & M.
A.210 - Office Machines
A.212 - Office Layout
A.216 - Computers & their applications
A.285 - Personnel & Trg. records
A.468 - Info^n. storage & retrieval
A.471 - Form design.

INFORMATION STORAGE & RETRIEVAL

- System design & info^n. collection
- Information storage & retrieval

SYSTEM DESIGN & INFO^N COLLECTION

- INFO^N Requirements
- System design
- Office machines
- Form design
- Involvement & motiv^n. of individuals

INFORMATION STORAGE & RETRIEVAL

- Filing systems.
- Card systems.
- Computers.

Management of Change 6.09 — 6.14

Form Design A.471

Office Machines A.210 A.216

Flow Charting A.75

What decisions or actions can be taken

FILING SYSTEMS

Files
- blind files
- kardex (flat tray visible systems)
- vertical visible systems.
- top edge visible system A.468

Filing cabinets
- 5 drawer cabinets
- lateral filing A.212

Miniature records
- microfilm
- microfiche

CARD SYSTEMS

Storage & Retrieval System	Work required		
	Storage	Retrieval	
		Item Question	Feature Question
Wallet	Easy	Hard	Very Hard
Item Card	Fairly Hard	Easy	Hard
Item & Feature Cards	Hard	Easy	Easy

Issue 2

CAREER DEVELOPMENT

* What skills do staff need ?
* How does the need for these skills change as the career develops ?
* What career development would be acceptable at each level ?
* How would individual programmes be put together ?

SKILLS NEEDED

A - Technical ability.
B - Self-management ability.
C - Ability to work with colleagues.
D - Ability to work with your boss.
E - Ability to manage staff.
F - Ability to steer the organisation.

PROPORTION of EACH SKILL

- As staff gain experience & are promoted, so their effectiveness in getting results will require different skills.

TECHNICAL ABILITY (A)
- Newly joined recruits have to gain & use their technical ability for the majority of their time.
- They are closely controlled & have little discretion.
- As they progress their discretion increases.

SELF-MGT. ABILITY (B)
- Ability to plan & control their work. Needed less in junior positions when work is organised. Less in senior positions where work is delegated.

WORKING WITH COLLEAGUES (C)
- To persuade, communicate & relate to them. Less in junior positions lacking discretion. Less in senior pos^ns where power resides.

WORKING WITH YOUR BOSS (D)
- To persuade him/her & understand his/her needs.
- Less in junior positions in routine jobs. Less in senior pos^ns where more discretion.

MANAGING YOUR STAFF (E)
- To create a climate in which they give of their best.
- Zero where no staff are employed. Max^m where jobs are boring or more staff used.

STEERING THE ORGANISATION (F)
- Plan its course; get resources; monitor progress influence where it is going.

INDIVIDUAL PROGRAMMES

- Career linked programmes.
  - These courses would be planned into each individual's programme at a suitable stage in their career.
- Meeting specific needs.
  - These courses could be taken up by each person as a refresher or to meet a specific need.
  - Each individual would plan to spend 3 days p.a. (at least) on these courses.

CAREER DEVELOPMENT

- Career linked courses.
- Courses to meet specific needs.

CAREER LINKED COURSES

A - Technical qualifications.
B - 1 week "Self management".
C - 1 week "Interpersonal skills".
D - 1 week "Problem Solving".
E - 1 week "Leadership".
F - 1 week "Planning & Organ^n Development".

MEETING SPECIFIC NEEDS

- Courses could be mounted regionally 3 times per year.
- 1 day courses on
  - Self management,
  - Problem solving,
  - Interpersonal relations.
- Different topics on each subject each time

TOPICS (examples)
- Self management - Time mgt.; M.B.O.; Networks & barcharts.
- Problem Solving - Creativity; Project Evaluation; Influencing Styles; Managing Change.
- Interpersonal Skills - Leadership Styles; Listening & Communication; Organisation Dev't.

JOB EVALUATION (J.E.)

* What is JOB EVALUATION ?
* The function of J.E.
* Methods of J.E.
* Carrying out J.E.
* Major policy decisions.
* Selecting a J.E. plan

JOB EVALUATION

- Definition
- What might J.E. achieve?

DEFINITION

- JE is a set of methods designed to help produce a structure of wages and salaries within the organisation.....
- by measuring systematically the relative worth of jobs & assessing their actual content.
- Concerned with the worth of the job & not the merit of the person doing it now.

J.E. COULD ACHIEVE.....

- ORDER out of a chaotic wage structure.
- SYSTEMATIC DATA for establishing WAGE SCALES.
- ORDERLY RELATIONSHIPS between job scales.

LEADING TO .....

- reduction of labour turnover,
- increased output,
- improved morale,
- reduction in time lost in disputes,
- reduction in wage complaints,
- reduction in pay anomalies.

AS WELL AS ....

- carefully prepared job descriptions

LEADING TO ....

- better employee selection,
- improved promotion ladder,
- better training,
- better cost control,
- less overlap of duties,
- better pay administration.

THE FUNCTION OF J.E.

If designed to suit the org'n, the scheme should :-

- evaluate the threshold of the job,
- be impersonal,
- use experienced assessors,
- be capable of full disclosure,
- be simple,
- allow for averaging of assessors opinions,
- make assessors work as a group.

ESSENTIAL PREREQUISITES

- Mgt. must be committed.
- Comm^n. must be good.
- Precede JE with a survey.
- Choose assessed "factors" carefully.

METHODS OF J.E.

- Ranking.
- Paired comparisons.
- Classification (Grading).
- Points rating.
- Factor comparison.
- Job profiling (Urwick, Orr & Ptnrs)
- Time span of discretion (Tavistock)
- Guide chart profile method (Hay M.S.L.)
- Decision band theory (Paterson)
- "Successful Job Evaluation Assignment"

SELECTING A PLAN

- Decide the purpose of J.E.
- Decide the criteria for effective J.E.
- Select the appropriate method.
- Select the scheme appropriate to Co^y size.

MAJOR POLICY DECISIONS

- Should J.E. be done & what union participation ?
- What J.E panels or ctt^ees necessary?
- Designing the scheme - what methods?
- Comm^n. & Trg. - who is told, how much, and when ?
- Job Descriptions - what, by whom, when?
- Should there be a pilot exercise?
- For the main evaluation - what time-table, batch size, admin^n. req'd ?
- Grade & Pay structures - who decides?
- Should results be published ?
- What appeals structure - if any ?
- How to maintain the scheme ?

CARRYING OUT J.E.

- Who is responsible for doing J.E.?
- Who shall carry out the job?
- Who will form the assessment panel?
- Write Job Descriptions (J.D.)
- Decide "Datum Line" for J.D's.
- Assess - but over what periods?
- Establish a marking scale.
- What factors for assessment?
- Decide procedures for assessment.
- Wage scale determination.

select key jobs, set the scale, fill in the scale, weight factors, assess the jobs.

supervision, relationships, judgements & decisions, ed. trg. & experience, skill.

choose the factors, select a marking scale, select key jobs, prepare J.D's, interview key job holders, assess the jobs, weight factors

the range of jobs, size & no. of steps, present earnings, anomalies, exceptional job rates.

JOB SATISFACTION

- ✱ High job satisfaction
- ✱ Does job satisfaction matter?
- ✱ Nature of job satisfaction
- ✱ Improving job satisfaction
- ✱ Signs of frustration

FACTORS ASSOCIATED WITH HIGH JOB SATISFACTION

- High pay
- Good promotion prospects
- Variety.
- Unobtrusive supervision.
- Meaningful tasks.
- Greater responsibility
- Self pacing
- Chances for self-development
- Security
- Social contacts
- Feedback on performance

order not significant

Maslow's Hierarchy of Needs

Highest
- Self-fulfilment – creativity
- Ego needs – self esteem, status.
- Social needs – belonging
- Safety needs – protection

Lowest
- Physiological needs – food, shelter, sex.

J/S DOES IT MATTER?

- MORAL view
- ECONOMIC view
- BEHAVIOURAL view

MORAL VIEW

J/S – a natural output of work NOT an input to higher efficiency.
– see Maslow's hierarchy of human needs

ECONOMIC VIEW

How does it benefit the firm?
- Improved productivity
- Liking the job

IMPROVED PRODUCTIVITY

Relates to effort & purp (motivation) by :-
- quality of output
- quantity of output
- co-operation
- reduced downtimes

LIKING FOR JOB

As indicated by :-
- fewer accidents
- increased cheerfulness
- reduced
  - lateness
  - overtime
  - absenteeism
  - training costs
  - demarcation prob
  - complaints & grievances
- lower labour turnover

BEHAVIOURAL VIEW

J/S reduces :-
- Social problems
- Boredom / monotony
- Physical strain
- Mental stress

NATURE OF J/S

- Occupational Satisfaction
- Task Satisfaction

Enjoys doing required tasks

Extrinsic – money, mates, social meaning.

IMPROVE J/S by :-

- Job Rotation
- Job Enlargement
- Job Enrichment
- Job Redesign

JOB REDESIGN

- Use mens' natural abilities eg judgement.
- Allocate routine, mechanical oper^{n}s
- Job grows with the man's learning.
- Obvious career prospects.
- Worker gains recog^{n}, social context enhanced.

JOB ROTATION

- Reduces monotony, adds variety

JOB ENLARGEMENT

- Opposite of job fragmentation

JOB ENRICHMENT

- Remove controls
- Incr. accountability
- Incr. authority
- More diff. tasks

SIGNS OF FRUSTRATION

- Physical signs
- Mental signs
- Reactions

PHYSICAL SIGNS

- Lethagy
- Insomnia
- Heart disease
- Headaches / migraines
- Excessive smoking/drinking
- Inadequate sex life
- Gastric disturbances.

MENTAL SIGNS

- Anxiety
- Tension
- Boredom
- Worry
- Depression
- Mental illness

REACTIONS

- Withdrawal
- Regression
- Verbal & displaced aggression
- Fantasy & goal substitution

JOB ENRICHMENT

* What do people need from their job?
* How do you provide for those needs?

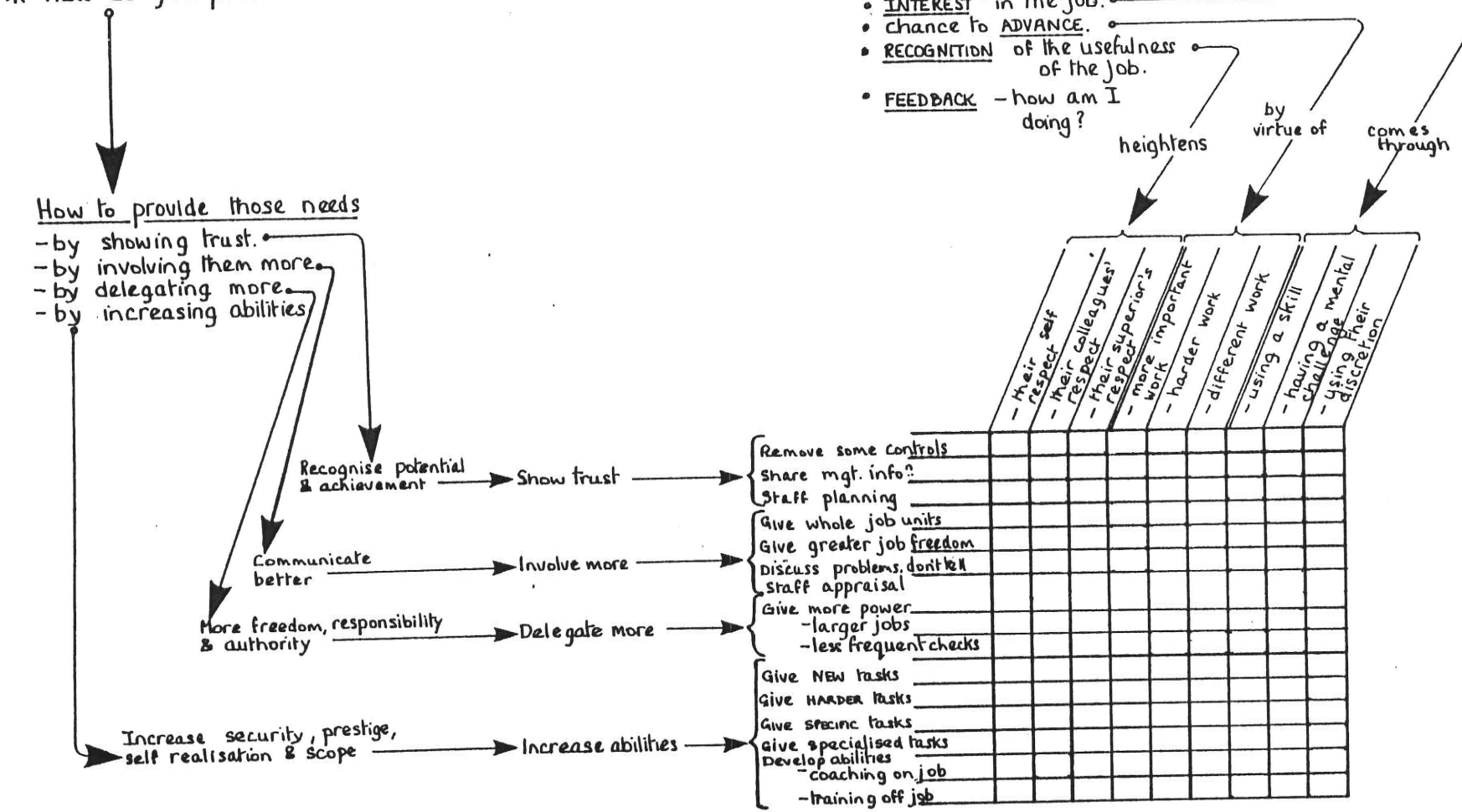
NEEDS of people from their jobs

Remuneration is surprisingly low on the list.
To be thoroughly satisfied, people must have;-

- INTEREST in the job.
- chance to ADVANCE.
- RECOGNITION of the usefulness of the job.
- FEEDBACK – how am I doing?

How to provide those needs

- by showing trust.
- by involving them more
- by delegating more
- by increasing abilities



-How do you rate as a manager?
-How do you rate your boss?

SELF DEVELOPMENT

* SETTING YOUR OBJECTIVES
* DEVELOPING YOURSELF
* DEVELOPING YOUR STAFF

DEVELOPING YOUR STAFF
- Counsell your staff & make them aware of the need to develop themselves.

DEVELOPING YOURSELF
- On-job experience
- Discussion
- Training courses
- Reading

ON-JOB EXPERIENCE
- Encourage your boss to delegate.
- Look for opportunities for personal growth in your job.

READING
- Improve your management & specialist skills by regularly reading.....
  - trade & professional journals.
- Identify subject areas to read around & plan a programme.

TRAINING COURSES
- These are necessary to develop :-
  - Interpersonal skills,
  - Management skills,
  - Self-management skills,
  - Specialist / technical skills
    - in new areas, &
    - in existing areas.

DISCUSSION
- With experienced colleagues.
- At professional institutions.
- At conferences, seminars & on courses – both formally & informally.

DEVELOPING YOURSELF
- Plan your programme by :-
  - discussion with your boss.
  - discussion with a training specialist.
- Agree a programme.
- Carry it out.

SETTING YOUR OBJECTIVES
- Examine your job description
- Think of job progression
- Make a career/life plan
- List your strengths & weaknesses.

JOB DESCRIPTION
- Study it, if one is available.
- Write it (again) in your own words.
- Allocate your time.
- Discuss it with your boss.

- Use words which would be understood by a 10-year old child.
- Plan it using a spider diagram. (See S.314a)

JOB PROGRESSION
- Where do you want to be in .....
  - 3 years ?
  - 5 years ?
- What do you have to do to get there ?

CAREER/LIFE PLAN
- What do you want to do with your life ? (See S.101k Setting Life Objectives)
- What do you have to do to achieve this ?

STRENGTHS & WEAKNESSES
- Recognise your STRENGTHS & build upon them.
- Recognise your WEAKNESSES & try to eliminate them.
- Consider your abilities to :-
  - work with people
  - manage yourself
  - create ideas
  - accept risk

HOW CAN YOU USE YOUR STRENGTHS & REDUCE YOUR WEAKNESSES ?
→ DEVELOP YOURSELF

WORKING WITH PEOPLE
- Enthuse & get commitment.
- Channeling their efforts.
- Dealing with personality clashes.
- Listening.

SELF MANAGEMENT
- Clarity of thought.
- Ability to wait.
- Ability to plan & control.
- Motivate others to get things done.
- Right attention to detail.
- Singlemindedness.

ACCEPT RISK
- Need for achievement.
- Acceptance of failure.
- Develop self assurance

CREATING IDEAS
- Originality.
- Imagination.
- Uninhibited.

A.322 - Career Counselling
A.361 - Setting Goals & Objectives
A.480 - Pairs Comparison.
A.580 - Trg. Design Algorithm.
C.324 - Setting Personal Goals

∝ Issue 2

SETTING LIFE OBJECTIVES

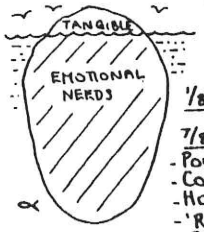
* WHERE ARE YOU GOING ?
* WHERE DO OTHERS WANT TO GO ?
* HOW TO AGREE TARGETS
* HOW TO START 'CHANGE'

HOW TO START CHANGE ?

- "People are only motivated to solve a problem when they own the problem and the solution."
- "People are frequently in the situation :
  - they don't recognise the problem
  - they don't want to recognise it, &
  - they don't want a solution."
- "People sometimes recognise the problem but don't want any solutions. They may be frightened of the effect of change or of getting change to happen."

- You have 'direct power' - doing things yourself.
- You have 'indirect power' - using persuasion, coercion, convincing.

- You can use 'push' styles - forcing another person by :-
  - logical reasoning & offering rewards.
  - threatening, nagging & being aggressive.
- You can use 'pull' styles - getting them to want to change by :-
  - involvement, listening, giving responsibility,
  - sharing hopes & enthusiasm, being open & asking for help.



"People's needs are affected at least as much by intangible needs as they are by their tangible needs."

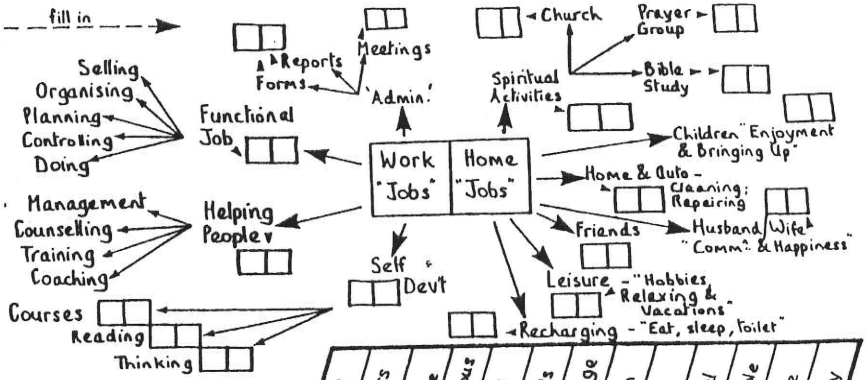
1/8 TANGIBLE NEEDS :- money, goods & services.

7/8 EMOTIONAL/INTANGIBLE NEEDS
- Power, status, need to control.
- Comfort & recognition.
- Hopes, fears & perceptions.
- 'Rewards' & 'Penalties'.
- Relationships & norms.

WHERE ARE YOU GOING ?

- How do you spend your time ?
- How would you like to spend your time ?
- What prevents you spending your time differently ?
- How can you overcome these problems ?

e.g. 2% 5% — fill in →



EXERCISE : take each area at a time (possibly combining some) & ask yourself :-
- why do I do this ? do I need to ?
- what time does it really need ?
- what problems does it cause me ?
- who else is involved ?
- can I discuss it with them ?
- how do I overcome these problems ?
- where can I save time ?

WHERE DO OTHERS WANT TO GO ?

- You cannot just assume you know what others want. Be open about your :
  - concerns & wishes,
  - feelings & attitudes.
- Find out how they really feel.

HOW TO AGREE TARGETS

- Agree the present situation :
  - how deeply have you looked into the problem ?
  - consider tangible & emotional factors.
  - what are my problems ?
  - what are other's problems ?
- Agree the targets :
  - consider tangible & emotional needs.
  - what are my targets ?
  - what are other's targets ?
- How to achieve our targets ?
  - think of lots of 'ideas', practical & impractical ones, leading to creative solutions.
  - develop alternative solutions.
- Agree the plan to follow :
  - who does what & when ?

PAIRED COMPARISONS

	Making Money	Helping others	Gaining knowledge	Becoming famous	Serving Jesus	Making friends	Happy marriage	Good children	Good home	Being powerful	Leading people	Being secure	Being healthy
Making lots of money.													
Helping other people.													
Gaining knowledge.													
Becoming famous.													
Serving Jesus.													
Making friends.													
Happy marriage.													
Children to be proud of.													
Home you are proud of.													
Being powerful.													
Becoming a leader.													
Being secure.													
Being healthy.													
Total each column													

These are not mutually exclusive. By thinking about their ordering (ranking) you will be able to allocate your time to give yourself and others around you a better & more fulfilled life.

ONION MODEL OF A PROBLEM

1st Layer :- one sees symptoms not causes; tangible costs & quality; futility.
2nd Layer :- blaming others; I am the victim.
3rd Layer :- what role am I playing ? Helping or hindering a solution ?

	/min	/hr	/day	/wk	/month	/year
1%	½s.	36s.	¼hr.	1¾hr.	7½hr.	87hrs.
2%	1s.	1¼m.	½hr.	3½hr.	14¾hr.	174hr.
5%	3s.	3m.	1¼hr.	8½hr.	37hr.	18½d.
10%	6s.	6m.	2½hr.	17hr.	73hr.	36½d.
25%	15s.	15m.	6hr.	42hr.	183hr.	91d.

PAPERS :-
A 480 :- Paired Comparisons

SELF MANAGEMENT (ATTITUDE OF MIND)

* SYMPTONS OF MISMANAGEMENT OF TIME
* CURES FOR MISMANAGEMENT OF TIME

SYMPTOMS OF MISMANAGEMENT
- Emphasis on the wrong thing :-

ACTIVITY	v	ACTION
EFFICIENCY	v	EFFECTIVENESS
URGENCY	v	IMPORTANCE
PERFECTION	v	EXCELLENCE

CURES FOR MISMANAGEMENT OF TIME
- Self examination of attitudes.
- Attitude to time.
- Delegation.

DELEGATION
- Plan delegation & train others.
- Delegate whole jobs.
- Explain the results required. (Not the method to use)
- Don't intefere. (Be available if required)
- Have faith in others.
- Give feedback when job is completed.

ATTITUDE TO TIME
- Time, the irreplaceable resource.
- Discretion over < 2hrs/day.
- Use right kind of time for right job.
- Recognise mismanagement
  - Obvious & disguised
- Recognise limits & be prepared to say "NO".

"URGENCY" v "IMPORTANCE"

JUGGLER	MANAGER
SNAP DECISIONS	CONSIDERED DECISIONS OR DELEGATED DECISIONS
LATEST THOUGHTS & ONLY THOUGHT	PREPARED & ABLE TO TAKE TIME WHEN IT IS REQUIRED

"ACTIVITY" v "ACTION"

BEING BUSY PUTTING in INPUT	GETTING THINGS DONE & FINISHED
TOO MANY JOBS AT ONCE - CRISIS NORMAL	DOING ONE JOB & FINISHING IT
INVOLVED IN TOO MANY AREAS - ALWAYS INTERRUPTED	ABLE TO SAY 'NO'
HELPING EVERYONE WITH THEIR PROBLEMS	RECOGNISING PRIORITIES
NOT DELEGATING - ENOUGH JOBS - FULLY ENOUGH	GETTING OTHERS TO DO THINGS

"PERFECTION" v "EXCELLENCE"

WORK PLANNING PREVENTING WORK	ENOUGH PLANNING TO MAKE BEST USE OF TIME
TOO MUCH DETAIL	ENOUGH DETAIL TO ACHIEVE OBJECTIVES
TOO HIGH STANDARDS	TIME ALLOCATED TO ALLOW FOR ALL PRIORITIES
NEED TO BE SEEN TO SUFFER FOR COMPANY	NEED TO WORK HARD & STILL HAVE OWN LIFE

FILM :- "TELL MY WIFE I WON'T BE HOME TO DINNER"

PAPERS :-
A.101 - Self Management
A.1103 - Delegation

"EFFICIENCY" v "EFFECTIVENESS"

DESIRE TO MAKE AN IMPRESSION - HOLDING MEETINGS; TAKING WORK HOME.	WANTING TO ACHIEVE RESULTS
WANTING TO HAVE ALL THE SUCCESS ONESELF	LETTING OTHERS TACKLE COMPLETE JOBS
WANTING TO BE INVOLVED WITH EVERYTHING	DELEGATING & NOT INTERFERING
BLAMING EVERYONE BUT SELF FOR PROBLEMS	TACKLING PROBLEMS IN "HERE & NOW"
ONE MAN BAND	TEAM LEADER / MEMBER

SELF MANAGEMENT

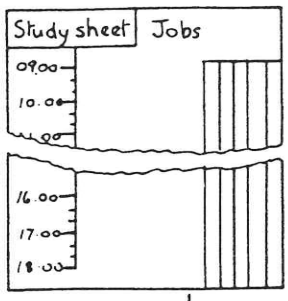
* How can you establish the work you have to do ?

Establishing your work load

* Measure what you do now
* Analyse what you do now
* Plan what you should do
* Programme what you hope to do
* Monitor what you have done

Job diary

Activity Sampling



F40

eg. Routine work / special projects / Communications / thinking / etc.

Jobs	Time taken	Time planned

F41

* problem solving activities
- decision making activities
- planning activities

* letters (reading / writing)
- reports (prepare / read / write)
- telephone (your call / o-s calls)
- meetings / discussions (planned / interruptions customers / suppliers / personnel)

disciplining, interviewing, complementing, appraising, counselling, training, developing.

How well are you meeting your programme ? How can you improve ?

Job description – write a j-d to help you decide what the job entails, so that you set
- key tasks
- objectives
- controls
- allocate responsibilities

Decide how your time should be spread

Set priorities.
Allocate time.
Plan time – long term.
– short term.
Plan urgent jobs first.
Plan unpleasant jobs first.
Be reasonably flexible.

PAPERS :-
A 101 - Self Mgt.
F 40, 41, 42, 43, F 44, 45.

FILM :-
"Time to Think

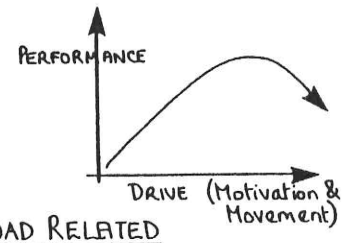
STRESS

* WHAT IS STRESS ?
* HOW IS STRESS CAUSED ?
* HOW CAN YOU IDENTIFY STRESS ?
* HOW CAN YOU AVOID STRESS ?

"If you can fill the unforgiving minute with 60 seconds worth of distance run, yours is the earth & everything that's in it and a coronary before you're fifty-one."

STRESS

- The result of a person being pushed beyond the limit of their natural ability.
- After the strain is removed the person does not return to their previous state.



THE CAUSES OF STRESS

- Work load related
- Personality related
- Physical factors

WORK LOAD RELATED

- Overworking :-
  - Too great responsibility.
  - Too close supervision.
    - negative feedback only,
    - too little room for manouvre.
  - Too much control.
    - poor paced work,
    - too fast assembly line.
- Confused working :-
  - Conflicting priorities.
  - Disordered environment,
    - continual interruptions.
  - Feedback too little ; too late ; distorted ; too much information.
  - Ambiguity - unclear objectives.
  - Too little control.
- Underemployment :-
  - Too little depending upon actions.
    - job ignored,
    - job depracated.
  - Stress generated by fear.
    - loss of job,
    - loss of face (to others & self)
  - Underemployment from :-
    - recruiting to too high standard.
    - recruiting to keep up establish't.
    - transfer to avoid redundancy.
    - overpayment stops leaving.
    - cancellation of expectations.

PHYSICAL FACTORS

- Age related
  - menopause ♀ & ♂
  - fear of underemployment; redundancy; depracation.
  - problems from poor feedback.
  - problems from paced work.
- Physical fitness :-
  - low threshold increases vulnerability to stress.
  - large infrequent meals reduces fitness.
  - reduce smoking & drinking.
  - get more sleep & exercise.
- Sex differences :-
  ♀ suffer more minor stresses.
  ♂ suffer more major stresses.

PERSONALITY RELATED

- Extrapunitive, takes it out on others when things go wrong. Generally extrovert; status conscious; decisive decision taker. Stress from confused working.
- Driving, always trying to get things done. Generally poor team member; doesn't suffer fools; prefers short term problems. Stress from underemployment.
- Intropunitive, takes it out on themselves when things go wrong. Generally introverted ; withdrawing ; careful. Stress from over-working.

AVOIDING STRESS

- Chronic Stress
- Acute Stress

AVOIDING ACUTE STRESS

- Decide if you are doing the right job.
- If under immediate stress .....
  - take deeper breaths,
  - pace the interview,
  - answer one Q. at a time,
  - answer Qs. with Qs.,
  - keep calm - remember your appearance to others.

AVOIDING CHRONIC STRESS

- Keep fit & sleep enough,
- Plan relaxation & limit work time,
- Avoid interruptions,
- Don't get worked up - at work, - in car,
- Are you in the right job ?

What do you want from life ?
"Death is Nature's way of saying 'slow down'."

IDENTIFYING STRESS

- Unusual behaviour eg.
  - tiredness,
  - nervousness,
  - blaming others,
  - not getting the job done,
  - flying off the handle more often,
- Chronic stress comes from long term STRAIN.
- Acute stress comes from major STRAIN.

PAPERS :-
A1346 - Some causes & consequences of industrial stress.

∝ Issue 1

OFFICE MANAGEMENT

* WHY HAVE OFFICES ?
* PRINCIPLES OF MANAGEMENT

WHY HAVE OFFICES

- Control centres for your own organisation
- Providing services to others

OFFICES AS CONTROL CENTRES

- Correspondence & secretarial servicentres.
- Sales invoicing & accounts.
- Purchasing & purchase accounts.
- Wages; cash handling & control.
- Stock & production control.
- Cost, budgetary control & management accounts.
- Data processing.
- Mail handling, filing & reprographic services.
- Reception & telephone.
- Security; First Aid; H. & Safety monitoring.

A valuable boundary between an organisation & its environment.

OFFICES PROVIDE SERVICES TO OTHERS eg.

- Information & advice,
- Computing & library,
- Banking & insurance,
- Ticket sales & bookings,
- Tax & licenses, etc.

PRINCIPLES OF MANAGEMENT

Management is :-

- Using your resources as effectively as possible to provide your service
- Working through other people to achieve your objectives
- Satisfying conflicting needs (Task/Group/Individual)
- Anticipating & solving problems.

WHAT RESOURCES DO YOU HAVE ?

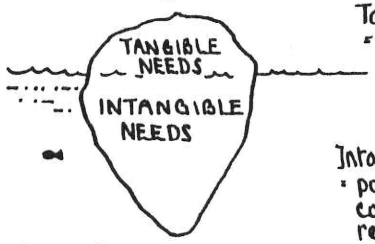
- PEOPLE
  - How well do you use their abilities ?
  - How do you develop their abilities ?
  - How well do you use their time ?
  - Do they use the best methods ?
  - How are they motivated ?
- EQUIPMENT
  - How 'cost effective' is it ?
  - How well utilised is it ?
  - How can you improve its utilisation .... to reduce costs, & to improve quality !
- SPACE
  - How can you use it better to ... . reduce costs; improve work flows; create more pleasant surroundings ?
- TIME
  - How quickly do things get done ?
  - How can you improve 'turn round' times ?

HOW DO YOU WORK THROUGH PEOPLE ?

- Communication, sharing information, attitudes & feelings to create an atmosphere in which people will .....
  - want to provide goods/services,
  - be able to provide them.
- Organisation, creating a structure & the procedures which enable the organisation's plans to be implemented. (Planning; control & clerical systems)
- Getting things done, & avoiding problems arising from :-
  - lack of trust & fairness,
  - insufficient time to manage,
  - lack of motivation,
  - lack of resources,
  - individual wants, arising from status & protocol & excessive control.

SATISFYING CONFLICTING NEEDS (ICEBERG MODEL)

People's reactions are affected at least as much by political factors.... (Power, status & the need for control) .... & personal factors ..... (Hopes, fears, perceptions, stereotyping, etc.) .... as they are by the need to provide goods or give a service.



Tangible needs
- Money; goods; service;

Intangible needs
- power & status; control & comfort; recognition.

∝ Issue 2

THE ROLE OF THE OFFICE MANAGER

* WHAT ARE YOUR RESPONSIBILITIES ?
* IMPROVING OFFICE PRODUCTIVITY

OFFICE RESPONSIBILITIES
- Providing a service,
  - Internally, to the main organisation.
  - Externally, to customers, community, etc.
- Using resources effectively.
  - Men; money; materials; machinery; time; etc.

IMPROVE PRODUCTIVITY by :-
- Motivating your staff
- Improving your methods
- Managing time better

OFFICE RESPONSIBILITIES
- Draw up job descriptions.
- Set objectives.
- Delegate jobs
- Discuss problems, communicate.
- Monitor & evaluate performance

What services do you provide?
What resources do you use?
What are your responsibilities?
What targets do you set?
How can you involve your staff more to meet these responsibilities?

MANAGING TIME BETTER
- Measure how time is used.
- Plan how better to use it.
- Use it more effectively.
- Set a good example.
- Communicate your intentions.

How do you spend your time?
How do your staff spend their time?
How could you/they use time better ?

IMPROVING YOUR METHODS
- Analyse present methods by scrutinising :-
  - document flows,
  - form design,
  - manuals & training procedures,
  - time usage,
  - matching internal procedures with external demands.
- Get new equipment & improve office layout by :-
  - studying office/eqpt. journals,
  - analyse office systems in use,
  - criticise current office layout,
  - pay attention to office P.R.

How can you analyse your present methods?
How can you record them?
How can you improve them?

How can you JUSTIFY new office equipment?
How do you know what to get ?
How can you layout the office better ?

MOTIVATING YOUR STAFF by :
- Looking after their needs, through
  - job enrichment,
  - delegation,
  - safety consciousness,
  - improved communication.
- Being someone they respect.
  - being supportive,
  - getting things done,
  - being fair,
  - being open,
  - communicating well.

How can they respect you?
How can you help them?
When could you be more open with them?

How can you motivate them
How better can you look after their needs?
How can you get them to want to help you?

WHAT ARE YOU GOING TO DO ABOUT IT ? ... AND WHEN ?

OFFICE MACHINES

* SELECTING THE MACHINE
* TYPES OF MACHINE

PAPER :- A 210 - Office machines.

SELECTING THE MACHINE

- What is required ?
- What is available ?
- Specifying machines.
- Choosing the machine.

WHAT IS REQUIRED ?

- Study the present work.
  - what does the staff do ?
  - what does the office set out to achieve ?
  - how does it reach that objective ?
- Mechanisation can achieve :-
  - cost reduction & reduced effort.
  - increased speed & accuracy.
  - easier control by supervision.
- Mechanisation causes problems :-
  - higher capital & running costs.
  - less flexible & vulnerable to breakdowns.

WHAT IS AVAILABLE ?

- Read widely (books, magazines) to build up a general knowledge of machine capability & major changes in this field....

THEN

- When a need occurs which may require that a machine be purchased, get detailed knowledge in that area from :-
  - suppliers
  - manufacturers
  - other (unbiased) sources eg. users & consultants.

SPECIFICATION OF REQUIREMENTS

- Define the objectives.
- Describe the basic requirements.
- Specify the limitations - speed; size; quality; etc.

TYPES OF MACHINE

- Communicating
- Calculating
- Sorting
- Filing

COMMUNICATING

- Instantaneous :-
  - Telephone (Single; PAX; etc.).
  - Telegraph (Facsimile; Telex; Teleprinter).
  - Television (C.C.T.V.).
  - Paging (Lights; speaker; personal receivers).
- Recording :-
  - Sound only.
  - Audiovisual.
- Mail :-
  - Collator.
  - Folders, inserters & sealers.
  - Openers & date stampers.
  - Pneumatic tubes.
- Writing :-
  - Typewriters.
  - Word processors.
- Copying :-
  - Photocopying.

FILING

- Filing cabinets.
- Microfilm.
- Microfiche.

SORTING

- Collating.
- Punched cards.

CALCULATING

- Calculators.
- Minicomputers.
- Computers
  - consider printed results or visible displays.

CHOOSING THE MACHINE

- COST - capital costs; installation & training cost; running costs
- SPEED - set-up time & running time.
- QUALITY - consider accuracy & appearance.
- FLEXIBILITY - consider the effect of a breakdown.
- EASE OF OPERN. - training problems & operator flexibility.
- RELIABILITY - consider mechanical reliability & servicing.
- RISK - consider effects of power failure & operator absence.

OFFICE SUPERVISION (THE FUNCTION OF THE OFFICE)

- WHAT IS THE FUNCTION OF YOUR DEPARTMENT ?
- COMMON AREAS WITHIN OFFICE SUPERVISORY FUNCTIONS
- WHY IS OFFICE 'COORDINATION' NEEDED ?
- FACILITIES FOR AN OFFICE

YOUR DEPARTMENT

- What is its function ?
- Why is it important ?
- How does it differ from similar depts ?
- What would be the implications of your department disappearing ?
- Discuss your dept. with someone from elsewhere.

FACILITIES NEEDED

- What building do you need ?
- What furniture is needed ?
- What equipment is necessary ?
- What layout is best ?

LAYOUT

Consider :-
- doors, walking distance,
- telephone & power points,
- lighting & heating,

etc.

EQUIPMENT

Consider :-
- what must be done by hand & what by machine,
- justify the cost of machinery,

etc.

FURNITURE

Consider :-
- durability & storage space,
- working heights & supports,
- hygiene & cleaning,

etc.

BUILDINGS

Consider :-
- size & location,
- noise & security,
- environmental facilities,
- cost of conversion, etc.

Issue 2

PAPERS :-
A.212 - Office Layout
A.75 - O & M.
C.27 - Office Layout

COMMON AREAS

- Looking after people
- Looking after the environment.
- Looking after the job.

LOOKING AFTER PEOPLE

- Selection,
- Appraisal,
- Training,
- Communication,
- Motivation,
- Pay Systems.

LOOKING AFTER THE ENVIRON.T

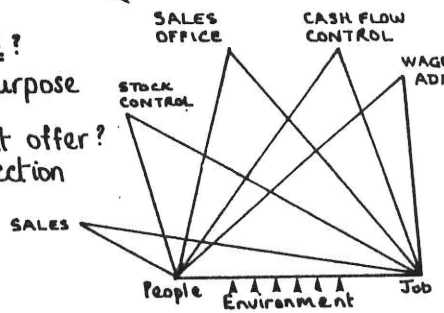
- Accommodation,
- Machinery,
- Organisation,
  - responsibility,
  - authority,
  - chain of command.

LOOKING AFTER THE JOB

- Methods,
- Workflow.

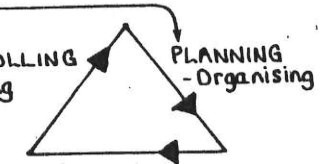
WHY HAVE AN OFFICE ?

- What is the main purpose of your company ?
- What service does it offer ?
- What does your section contribute ?



PLANNING & CONTROLLING - the 'office function'

THE ELEMENTS OF MANAGEMENT

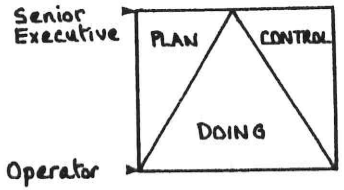


DOING
- Leading
- Communicating

LEADING

- Creating the environment where staff will give of their best,
  - have the right attitudes,
  - support their organis.n,
  - support their colleagues,
  - enjoy their work,
  - have pride, etc.

Inter- & Intra- Departments & Individuals.



OFFICE SUPERVISION (Increasing Productivity)

* LOOKING AFTER THE PEOPLE.
* LOOKING AFTER THE JOB.
* LOOKING AFTER THE ENVIRONMENT.

THE ENVIRONMENT

- Accommodation & Layout.
- Machinery & Equipment
  - providing the right eqpt.,
  - safety.
- Organisation of chain of command.

THE PEOPLE

- Selection.
- Communication.
- Training & Counselling
- Appraisal & Assessment
- Motivation & Leadership.

COMMUNICATION

- Tedium – many jobs can seem pointless & boring. This can be alleviated if the operator can discuss them & understand the importance of the job.
- Safety – the supervisors role requires he/she should make the staff aware of safety procedures/rules.
- Discipline – the supervisor must be prepared to talk to & discipline staff.

MOTIVATION & LEADERSHIP

- Modify the job to the person.

APPRAISAL & ASSESSMENT

- Define objectives.
- Drain out subordinates ideas – ask open Q's – listen.
- Agree on joint action.
- Summarise.
- Follow up.

THE JOB

- Methods & the reduction of Functions
- Work Flow
  - establishing priorities
  - distribution & delegation of work
  - controlling

METHODS & THE REDUCTION OF FUNCTIONS

- Work simplification
- Work structuring
- Document flow

CONTROLLING

- Set objective standards if possible ....
  - QUALITY – no visible correcting on clients letters.
  - QUANTITY – x letters per day.
  - COST – based on work measurement.
  - TIME LIMITS – all enquiries handled in 48 hrs.
  - LAYOUT – attractive, easy to read, house style, etc.
- Set targets for future work periods
- Assess employee performance.

DISTN & DELEG'N OF WORK

- Distribute work fairly – routine & special work.
- Give work to person who is most effective.
- Delegate effectively so they know what to do.

Work Simplification

Select – the oper.
Record – happenings
Examine – why?
Develop – new ideas
Install – best method
Monitor – for problems

Consider....
- Safety
- Design
- Layout
- Equipment
- Materials
- Quality
- Economy

EXAMINE

WHAT is achieved?	WHY is it needed?	WHAT else might be BETTER?
WHERE is it done?	WHY there?	WHAT other place might be BETTER?
WHEN is it done?	WHY then?	WHAT other TIME might be BETTER?
WHO does it?	WHY that person?	WHAT other PERSON might be BETTER?
HOW is it done?	WHY that way?	WHAT other WAY might be BETTER?

See PAPER: A 467 Document Flowcharts

OFFICE SUPERVISION (OFFICE SYSTEMS)

* HOW TO WRITE OFFICE MANUALS.
* HOW TO HANDLE CORRESPONDENCE.
* HOW TO ORGANISE RECORDS.
* HOW TO ORGANISE FILES.

WRITING MANUALS (ALGORITHMS)
- All procedures should be specified to :-
  - train recruits,
  - control quality,
  - improve the system,
  - help when someone is absent.

WRITING MANUALS
- Critically analyse existing methods.
- Write manual for the best method.
- Write .... simple instructions,
  .... clear cut,
  .... procedures broken down & numbered,
  .... identify pitfalls.

WRITING LETTERS
- Can standard letters or paragraphs be used ?
- Have the staff been trained to write letters ?

WRITING LETTERS
- Internal memos can use forms.
- Internal memos may be handwritten.
- Internal memos can be in note form.

(see S. 314c)

ORGANISING FILES
- Procedure problems.
- Equipment problems.
- Old system problems.
- Access problems.

RECORD SYSTEMS
- How to retain information ?
- How long to keep records ?
- How to store them ?

ACCESS PROBLEMS
- Too many people inputting.
- Too many people accessing.
- Files in the wrong place.
- Files removed without authority or recording.
- No files.

OLD SYSTEM PROBLEMS
- Too many cards.
- Bulging folders.
- Folder tags illegible.
- Too much old correspondence

EQUIPMENT PROBLEMS
- Equipment too dispersed.
- Equipment disorganised.
- Poor equipment
  - poor guides,
  - poor design,
  - unsightly.

PROCEDURE PROBLEMS
- Procedures not laid down.
- Procedures not adhered to.
- Procedures ineffective,
  - take too long to find,
  - too long to file,

HOW TO STORE THEM ?
- In folders,
- Loose leaf books,
- In filing cabinets (hanging/drawer),
- In KARDEX system,
- In boxes,
- On computer.

HOW TO RETAIN INFORMATION ?
- Keep original only.
- Copy original & file both in different places.
- Record information & destroy the original.
- Record information & keep original.

RECORD INFORMATION
- on a form - used once only,
  - used many times.
- in book/ledger,
- on computer,
- on microfiche.

HOW LONG TO KEEP THEM ?
- What would happen if we didn't keep them ?
- Records take time to keep, cost money to store them & take time to sort through.
- Have you any legal obligations to keep them & for how long ?

PAPERS :-

A-299	Algorithms.
A-467	Document flow.
A-471	Form design.
C.8	Form design.
C.11	Document flow

∝ ISSUE 2

THE SUPERVISOR AS A LEADER

* What qualities characterise a Leader?
* Principles of Supervisory Leadership

LEADERSHIP
- Definition
- The development of leadership theories
- Influential persons

LEADERSHIP :- definition.
Influencing behaviour towards the achievement of organisational objectives

PRINCIPLES
- Based on RESPONSIBILITY & AUTHORITY.
  - Giving the supervisor authority commensurate with the responsibility for completing his/her set work.
- Sources of authority.
- Supervisor's skills & knowledge

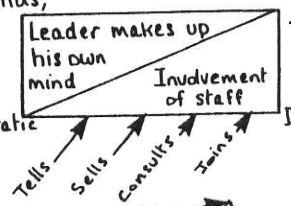
SOURCES OF AUTHORITY
- Conferred authority, given by the organisation. Sometimes inferred from different clothing, uniform, etc.
- Personal Qualities, implied by charisma, personality, temperament, etc.
- Knowledge, of product, work routines, skills, experience, training etc.

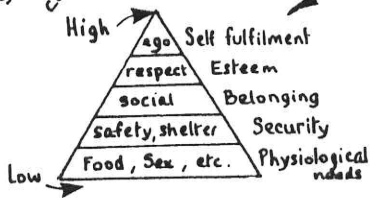
These may be enhanced by:-
- getting one's authority defined clearly and practising it.
- developing the right personal qualities
- obtaining more experience, training, etc

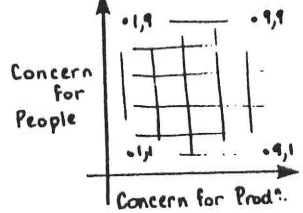
SUPERVISOR'S KNOWLEDGE
- Knowledge of objectives:-
  - make clear the job objectives.
  - Know where you are going.
  - your subordinates objectives
- Knowledge of communications:-
  - the value of good comm^{ns}
  - the channels of comm^{ns}
  - the methods of comm^{n}.
  - your position as link between management & workforce.
- Knowledge of individuals:-
  - superiors & subordinates.
  - differing needs, backgrounds, ambitions, personalities
- Knowledge of different leadership styles & when each may be most appropriate

LEADERSHIP THEORIES. Historical development:-
- The coercive stage (threat of dismissal). Used when labour was plentiful & jobs were few.
- The mechanistic stage - consider that improved 'hygiene' factors alone improved productivity.
- The psychological stage - consider more the motivational & individuals needs of workers.

LEADING EXPONENTS OF LEADERSHIP THEORIES
- Elton Mayo (1928-31) - Hawthorn Expts.
- Rensis Likert (1961) - Job-centred & Employee-centred Supervision
- Blake & Mouton (1964) - Managerial Grid
- John Adair (1973) - Action-Centred Leadership
- Douglas McGregor (1960) - One's style lay between two extreme poles 'X' & 'Y'
- Frederick Herzberg (1959) - Motivation/Hygiene Theory identified (+)ve & (-)ve motivators.
- Management By Objectives (M.B.O.)
- Abraham Maslow (1954) - One's needs had a hierarchical nature - not to be ignored.
- Tannerbaum & Schmit's Continuum of Leadership styles.







THE ORGANISATION & THE SUPERVISOR

- What organisation principles are there?
- Improving organisation structure

ORGANISATION

- Definitions
- Factors affecting organisation structure.
- Types of enterprise
- Roles within the enterprise
- Organisation structures

ORGANISATION STRUCTURE is the planned design of the company structure showing the relationships between all EMPLOYEES & the FUNCTION each should perform to make the organisation work effectively towards given objectives.
P.W. Betts 1973

IMPROVING ORGANISATION STRUCTURE

- This comes through examining the existing structure & identifying
  - weaknesses in procedures, omissions & failures.
  - suggesting/implementing corrective procedures.

COMMON WEAKNESSES IN ORGAN^{N} STRUCTURES

- Too many levels of authority,
  - bring decision-making closer to the people who will implement the decisions.
- Too many persons to supervise,
  - reduce the number & delegate more authority.
- Too wide a range of activities to supervise,
  - rationalize them.
- Duplication of facilities,
  - centralise activities for economic reasons.
- All organisation functions not covered e.g. P.R., staff development, quality control, training, etc.,
  - delegate responsibilities to cover these functions.
- Over-specialisation — diversification
- Insufficient delegation of responsibility,
  - delegation can improve motiv^{n} & growth in job.
- Split loyalties — identify your boss clearly.
- Poor communications — identify weaknesses & work on them.

TYPES OF ENTERPRISE

PRIVATE - Responsibility & policy decisions retained by owners. Admin^{n} & operational control is delegated.

PUBLIC - state controlled with varying degrees of operational autonomy.

MIXED ENTERPRISES

FACTORS AFFECTING STRUCTURE

- Areas of responsibility : often convenient to divide resp^{ys}
- Recognition of a leader : usually appointed, sometimes emergent.
- Group needs to organise itself to counteract pressures
- Factors specific to large companies

LARGE COMPANIES

CENTRALISATION - for policy making, salary negotiation, economy of purchasing, storage, delivery, etc.

DE-CENTRALISATION - to humanise the organisation, to improve motivation & commitment, to establish an individual identity, diversification, etc.

STRUCTURES+GPs

Line - hierarchical differentiation into work teams.

Staff - specialists available to advise at all levels eg. accountants, trainers, personnel etc.

PRESSURES

- **External**, other companies with structures seek for corresponding personnel with authority & responsibility.
- **Internal**
  - to improve comm^{ns}
  - to develop team spirit
  - to reduce conflict
  - avoid duplication of effort
  - to facilitate creativity & encourage enthusiasm.

ROLES WITHIN THE ENTERPRISE

- Shareholders — criticise & review, approve reports, plans, changes, etc.
- Directors — responsible for conduct of business & broad policy decisions.
- M. Director — decides future trends, plans, coordinates, controls, organises resources — money, men, materials, machinery.

SUPERVISORS OWN RESPONSIBILITIES

- Representing mgt. to staff & v.v.
- Coordination & liaison
- Communication — the US/THEM line
- Improving teamwork — through delegation, etc.

FOOTNOTE :- Away from the workplace, workers are also managers!

Issue 2

Principles of Supervision

* What is supervision ?
* Supervisory duties
* Supervisory authority
* Supervisory performance.

Supervision

- Definition
- The managerial element
- Who is the supervisor ?

Definition

The supervisors job consists of :-
- A technical element (knowledge of the product or service)
- A managerial element

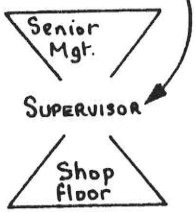
The managerial element

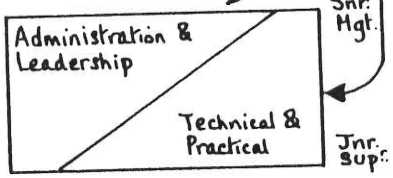
- Planning
- Organising
- Leading
- Coordinating
- Controlling

Who is the supervisor ?

- First level of management but with a variety of titles :-
  - foreman
  - overseer
  - team leader
  - charge hand
  - leading hand
  - ganger
  - section head
  - section manager
  - setter
  - machine minder

and an important role as a Comm^n. link





Supervisory Duties

Key result areas (KRA's) include :-
- give customer satisfaction,
- Know the job,
- leadership,
- communication,
- liaison & cooperation,
- safety,
- training & development,
- trade unions,
- welfare,
- instructions,
- credit for good work,
- fairness,
- using initiative,
- problem solving,
- equipment,
- housekeeping,
- working with specialists,
- economy, etc.

Sources of Authority

- Conferred authority
- Personal qualities
- Knowledge

by virtue of :-
- experience
- training
- acquired info^n
- acquired skills

etc.

by virtue of :-
- initiative,
- judgement,
- temperament
- tact, etc.

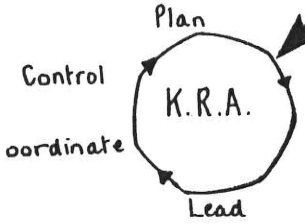
by virtue of :-
- education
- qualifications
- training
- job req^ts., etc.

Requires maintenance of Standards of Performance

in :- communication ↓ & ↑ ,
- initiative,
- discipline,
- planning & organisation,
- delegation,
- training,
- leadership,
- cost consciousness,
- staff recruitment, etc.

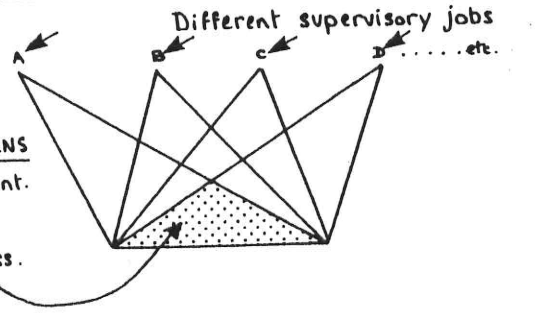
Quality standards ?
Time standards ?
What standards ?
How are they measured ?

Most have Common Requirements



Many contain Common Concerns

- Staff management.
- Safety.
- Quality.
- Cost effectiveness.
- etc.



SUPERVISING SPECIAL GROUPS

* What special groups?
* Women & part-timers
* Young people
* Older people
* Handicapped & disabled.
* Minority groups & multi-racial teams.

SPECIAL GROUPS ?

- Everyone is SPECIAL in some way. To groups of 'individuals', common general considerations do apply.
- Many 'individuals' form a group & 'group behaviours' develop & group psychology may be applied.

WOMEN & PART-TIMERS

- Why classified together?
- Equal opportunities.
- Factors affecting
  - attitudes
  - expectations
  - behaviour
- Shift working
- Employing P-T staff. ⊛

FACTORS

- Educational
- Religious
- Cultural
- Domestic
- Strength & stamina
- Selecting ♀ or ♂
- Protective legislation
- Emotions
- Pregnancy

WHY TOGETHER ?

- E.E.C. > U.K. for ♀ in employment
- F-T > P-T more are ♀

HANDICAPPED & DISABLED

- Definition
- Group relationships
- Supervisors responsibilities
- Factors to consider ⊛
- Building suitable?

DEFINITION

Disabled or disadvantaged if less than 100% in all their faculties. (see Disabled Persons Act)

RELATIONSHIPS with co-workers

: easier if disablement is visible (limbless) than not visible (diabetes).

SUPERVISORS RESP^{S}.

- Know who is disabled.
- Understand nature of disablement.
- Ensure other workers understand.
- Consider additional safety hazards.
- Know suitable 1st aid procedures.

FACTORS

- more/longer breaks.
- signs of impending illness.
- need for privacy for treatments.
- necessary emergency treatments.
- need for medical check-ups.

OLDER PEOPLE

- Definition
- Teaching older persons
- Jobs for older persons
- Retirement preparation

Know source of info^{n} & advice.

Slower?
Lighter?
More complex?
Builds on experience & expertise?

Difficulty 'unlearning'
Slower
Less susceptible to distraction.

DEFINITION

50–60 yrs, depending on the age of the person asked.

YOUNG PEOPLE ⊛

- Problems in First Job.
- Getting active cooperation

ENTRY PROBLEMS

- Their attitudes to :-
  - senior staff
  - rules & reg^{s}.
  - absenteeism
  - 'criticism, questionning.
- 'Cultural' differences.
- Rejecting established practices.

YOUNGER EMPLOYEES

Inexperienced, hazard prone.
Require training, educating.
Reorientation problems

Before	Now
- 5/6 hrs day	8 hrs day
- 3 months holiday p.a.	3 weeks leave p.a.
- variety	routine work
- protected environment	hazardous environment

OLDER EMPLOYEES

Advantages :- experienced
- safer
- more stable/loyal
- fewer (longer) absences

Disadvantages :- inflexible
- inertia
- resistance to change
- slower
- declining faculties

SUPERVISING MULTI-RACIAL TEAMS - PROBLEMS ⊛

- Communicating.
- Lack of rapport with group
- Language problems in training.
- Possible need of special facilities/considerations

Possible causes

Supervising groups of
- different sex,
- different nationality,
- different minority/ethnic groups,
- mixed sexes and or nationality,

..... to the supervisor.

Minority/Ethnic Gps.

- different languages.
- different cultural customs.
- different roles for ♀ & ♂

⊛ SPECIAL PROBLEM AREAS

- Recruitment & selection.
- Induction.
- Training.
- Delegation.
- Promotion selection.
- Handling complaints & grievances.
- Health & Safety implement^{n}
- Salary negotiations.
- Other I.R. activities.

SUPERVISOR'S ROLE IN CONTROLLING WORK

* The control process
* What is the supervisor's role ?
* Control techniques
* Critical control points

THE CONTROL PROCESS

- Definition.
- Steps to follow.
- Planning & control

DEFINITION

The control process is designed to monitor on-going activities continually & make changes in work characteristics to keep activities running as planned.

Work activities such as :-
- assignments,
- instructions,
- procedures.

THE SUPERVISOR'S ROLE

- Collecting control data
- Using control reports
- Controlling work

CONTROL TECHNIQUES

- Production & operating controls.
- Inventory controls
- Quality control
- Financial control

FINANCIAL CONTROL

- Less likely to be within the control of the supervisor.

QUALITY CONTROL

- Monitor reject rates.
- Support quality circle groups if interested.

CONTROL POINTS

- Function to monitor performance & give advance warning of problems, deviations, etc. e.g.
  - Health & Safety aspects;
  - Management by Exceptions, (to normal rules & standards).
- These will vary from company to company depending on whether its a production or service company.

INVENTORY CONTROL

- Material supplies.
- Goods in progress.
- Finished goods in stock.

OPERATING CONTROLS

- Employee performance.
- Machinery performance.
- Usage of Energy & Utilities.

Requires skills in handling persons. Helps identify poor training, machine inadequacies, material deficiencies, etc.

FILMS :-
'PRODUCTION CONTROL'
'BALANCE SHEET BARRIER'

PLANNING & CONTROL

- Plans show :-
  What should be controlled.
  How it should be controlled.
  What standards should be set.
- Controls give :-
  Basic data for plans.
  Data to reshape goals.
  Variances to be used to amend plans.

CONTROL DATA needs

on-time & accurate data.
Collect - time cards,
- prod^{n}. tallies,
- quality checks,
- utility consumption details, etc.

CONTROL REPORTS to

investigate the causes of variances &, if possible, correct them. If not possible, report them.

CONTROLLING WORK by monitoring

formal procedures, measuring results & registering reports & by exercising control over employees, investigating variances and taking the appropriate actions.

STEPS TO FOLLOW

- Set performance standards. → production quantity, production quality, materials use, product costs, to what tolerances?
- Collect data & measure performance. → Routine data from various centres e.g.
  - accounts,
  - prod^{n}. figures,
  - stock control, etc.
- Compare results with standards. → Compare results to give variances i.e. the difference between actual & planned results.
- Take corrective action.

Take action :-
- To correct unfavourable variances.
- To readjust standards & targets
- To amend procedures & processes.

- Not usually within the scope of the supervisor's authority.
- Standards usually set by :-
  - guesswork,
  - past performance,
  - systematic analysis.

Issue 2

BEHAVIOUR IN SUPERVISION (HUMAN RELATIONS)

- What is BEHAVIOURAL SCIENCE ?
- Human Needs (wants)
- Influencing behaviour
- Solving people problems.

BEHAVIOURAL SCIENCE

- Definition.
- Development of behavioural science

DEFINITION OF B.S.

- The study of people.....
  - their ATTITUDES at work,
  - their BEHAVIOUR at work,

.....used to provide insight into
- why people behave as they do,

& • how to influence behaviour.

DEV'T OF BEHAVIOURAL SCIENCE

Robert Owen c.	good employee welfare
Elton Mayo c.1931	Hawthorn Expt. - welfare & mot'n
Rensis Likert c.1961	employee or Job Centred sup'n.
Blake & Mouton c.1964	management grid
John Adair c. 1973	action centred leadership
Doug.s McGregor c. 1960	theory X and Y
Fred.k Hertzberg c 1959	hygiene factors
Target setting & M.B.O.	

INFLUENCING BEHAVIOUR

- Know your individuals, their differing
  - needs,
  - temperaments,
  - personalities,
  - backgrounds,
  - ambitions.
- Know about ATTITUDES...
  - what are they ?
  - how do they form?
  - why they are important

Definition

a frame of ref.ce that influences one's opinions & consequently his behaviour.

OR.

a predisposition to respond to certain stimuli.

HOW FORMED ?

usually by experience, through one's culture and emotions

IMPORTANCE ?

they condition one's responses & permit faster responses in/to particular circumstances.

HUMAN NEEDS

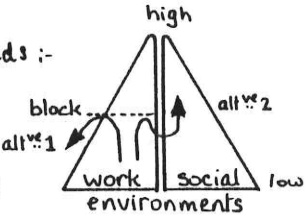
What do you want from your work?
- rank your needs by 'paired comparison' exercise.

MASLOW

Hierarchy of needs :-

↑highest :
- Self-fulfilment
- Self-esteem
- belonging & being accepted
- Security
- physiological needs

↓lowest



WHAT HAPPENS WHEN IMPORTANT NEEDS ARE NOT MET ?

Barrier in work environment can lead to 1 of 2 alternatives

ALTERNATIVE 1 - GRIEVANCE develops

ALTERNATIVE 2 - abdicates, turns energies elsewhere to home / social environment.

PEOPLE PROBLEMS

- Definition → a deviation from an expected standard.
- Diagnosis
  - look for 'patterns' of deviation.
  - seek clues from regular deviations.
  - check past records against current behaviour patterns (lateness, accidents, absenteeism, etc.)
- Action
  - generate alternative courses of action.
  - inform trained experienced personnel (if employed).
  - seek advice / pass on problem.
  - avoid amateur psychological analyses / analysts.

COMMON GRIEVANCE OUTCOMES

- complaints.
- reduced productivity / low quality work.
- accidents / carelessness.
- vandalism.
- discipline problems.

are there standard procedures to implement ?

GRIEVANCE INTERVIEW TECHNIQUES

- Start the chat.
- Listen, do not interrupt.
- Show interest.
- Do not argue.
- Paraphrase.
- Beware of making promises.
- Summarise at the end.
- Follow-up.

..... are you the best person to do this ?

Contents

PART 1 CONFLICT & NEGOTIATION

Negotiating towards Agreement	9.01
Negotiating towards Independent Advantage	9.02
Industrial Negotiation	9.03
Conflict Management	9.04
Role Conflict & Adaptive Responses	9.05
The Role of Conflict in Industrial Relations	9.06
The Consultant's Task in Reducing Conflict	9.07

PART 2 GENERAL MANAGEMENT

The Diffusion of Innovation & Change 1	9.08
The Diffusion of Innovation & Change 2	9.09
Perception & Organisational Behaviour	9.10
The Staff Function 1	9.11
The Staff Function 2	9.12
Line-Staff Relationships	9.13
The Anatomy of Management Structures 1	9.14
The Anatomy of Management Structures 2	9.15

PART 3 SELLING

The Selling Interview 1	9.16
The Selling Interview 2	9.17
Selling through Classified Ads 1	9.18
Selling through Classified Ads 2 - Introduction to Copy	9.19
Selling through Classified Ads 3 - Structuring the Ad	9.20
Selling through Classified Ads 4 - Comparing the Media	9.21
Selling to the Consumer Sector 1 - Store Selling	9.22
Selling to the Consumer Sector 2 - Direct Selling	9.23
Selling Goods (or Services) for Profit	9.24
Expo (Exhibition) Selling 1	9.25
Expo Selling 2	9.26
Expo Selling 3	9.27

PART 4 SALES MANAGEMENT

Is the Price Right ?	9.28
Motivating Sales Persons 1	9.29
Motivating Sales Personnel	9.30
Communicating with the Market 1 - Outwards	9.31
Communicating with the Market 2 - Outwards	9.32
Communicating with the Market 3 - Inwards	9.33
Telephone in Sales Management & Tele-Marketing	9.34
Working through an Advertising Agency	9.35
Selling Overseas - International Sales Managers	9.36
Management Training for First-line Sales Managers	9.37

PART 5 MANAGEMENT SKILLS

Managing Groups	9.38
Meeting an Individual's Needs	9.39
Achieving a Task	9.40
Action Planning	9.41
Justifying a Zero Defect Programme	9.42
Identifying Quality Managers 1	9.43
Identifying Quality Managers 2	9.44
Building Effective Teams	9.45
Teambuilding Effectively	9.46
More thoughts on Teambuilding	9.47
S.T.P. Model of Problem Analysis	9.48
Problem Solving using Force Field Analysis	9.49
Entrepreneurism	9.50

PART 6 INDEX

Keyword Index	pp 51/52

NEGOTIATING TOWARDS AGREEMENT

This is a creative process where the planned outcome is joint advantage, not a WIN:LOSE advantage or where goodwill is unimportant (ie conflict is evident).

* PURPOSE OF NEGOTIATION
* PROCEDURES FOR NEGOTIATION
* SKILLS OF NEGOTIATION

PURPOSE
- Explore each other's position.
- Recognise joint interests.
- CREATIVELY work towards agreement.

PROCEDURE
- Preparation
- Create a cooperative atmosphere
- Agree procedures
- Sequence the discussion
- Looking for possibilities

PREPARATION
- Prepare for the negotiation by assembling facts & figures to support arguments
- What do you consider a satisfactory pace, purpose, plan of action & assemblage of personalities ?
- Prepare opening statements.

ATMOSPHERE
- Begin with ice-breaking activities (non-controversial).
- Ideally, it should be :-
  - cordial & co-operative,
  - open, showing mutual trust & respect.
- Following proceedings to be brisk & businesslike.

LOOK FOR CREATIVE POSSIBILITIES
- Generate ideas (like brainstorming) while recognising mutual interests.
- Avoid focussing too strongly on any one suggestion.
- Recognise creative possibilities, look for 'bridges' between imagination & reality.
- Assess possibilities & agree action.

PROCEDURES
- Use the word 'agree' as you decide the ....
  - Pace of the negotiations → by WHEN should we expect agreement?
  - Purpose of the negotiations → refresh memories on WHAT agreement is needed.
  - Plan of action (Agenda)
  - Personalities → introduce all members in attendance with backgrounds & potential inputs.

SEQUENCE
- Offer opening statements - our understanding; interests; priorities; contribution; attitude; etc.
- Recognise common ground.
- Identify points of difference.
- Question, to seek clarification of points of difference.
- Listen, and suppress counter arguments.
- Summarise.

SKILLS OF NEGOTIATION
- Producing a positive response in the other party.
- Getting & giving information.
- 'Reading' the other negotiator(s)
- Preparing to change strategy.

- Their body language.
- 'Reading between the lines.'
- Following the 'hidden agenda'.

NEGOTIATING TOWARDS INDEPENDENT ADVANTAGE

- ✳ PURPOSE OF NEGOTIATION
- ✳ PROCEDURES FOR NEGOTIATION
- ✳ BIDDING
- ✳ BARGAINING

PURPOSE
- Establishing a 'best deal' in interest of self (or principals)
- NOT to work toward other person's (party's) disadvantage.

PROCEDURES
- Preparation
- Create a co-operative atmosphere
- Agree procedures
- Sequence the discussions

→ See OUTLINE 'Negotiating Towards Agreement'

→ - Bidding & Bargaining are an important part of negotiation.

BIDDING To shape 'the deal' state clearly WHAT you want.
- Opening bid sets the top limit → - Cannot be raised at a later stage.
- First bid will influence the final settlement → - Must be defensible or there is potential loss of face & credibility when challenged to justify it.
- It allows room for manoeuvre ('movement') at later phases → - In commercial negotiations, it would use a range of side issues for 'movement' e.g. price; delivery; servicing terms; discounts; quality; etc.
- Not so high it closes down the negotiations prematurely → - 'Tailored' to permit negotiations to continue.
- Stated clearly to carry conviction → - No ambiguity; no comment; no justification at this stage; no apology.
  - Now wait until after the counterbid is made.

BARGAINING also involves defending WHY you want what you have bid. Expect bids will be probed to discover what parts are considered:-
- essential
- desirable, or
- of fringe interest.

Bargaining sets out to discover where there may be flexibility in your opponents while reserving your own position. To determine whether to :-
- accept the offer,
- reject the offer, or
- negotiate further

→ - Can you bring pressure to bear to change circumstances? → - by you.
  - some other source, to increase your opponents need to settle.
- Raise doubts in opponents minds of getting a better settlement & conceal your need for a deal.
- What other options are possible to exert leverage?

INDUSTRIAL NEGOTIATION

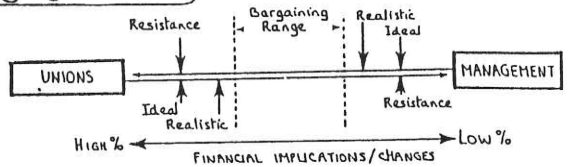
∝ ISSUE 1

* DIFFERENCES FROM SALES BARGAINING
* RITUALS OF NEGOTIATION
* TACTICS OF NEGOTIATION

DIFFERS from selling in that:-
- Negotiators are probably acting as agents for principals elsewhere
- They may need to refer to those principals to validate actions.
- There are agreed (unofficial) procedures & processes
- There are recognised rituals.
- There are cycles of action & inaction
- They are not noted for the speed of reaching agreement.

REPRESENTING:
- Government or employers.
- Unions or worker groups.

RITUALS
- Preparing the issues
- The meeting
- The negotiation
- The implementation



TACTICS
- Hear your opponents case, reveal little of your own.
- Identify common ground & points of divergence.
- Highlight your strengths & minimise your weaknesses
- Minimise opponents strengths & maximise their weaknesses
- Look for movement by opponents towards settlement

REACH SETTLEMENT

- Change opponents' expectations.

RAISE ISSUES - analysing the situation:
- Looking at local & national industrial circumstances & changes.
- Making comparisons & looking for precedents.
- Considering the consequences of action/inaction.
- Agreeing objectives & strategy

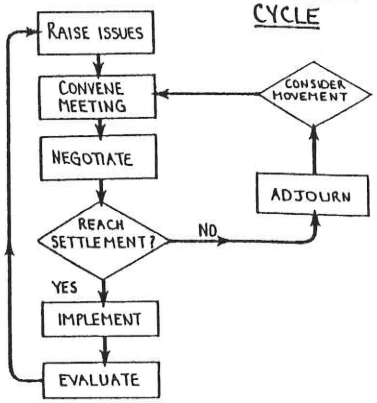
CONVENE MEETING consider:
- the venue,
- who attends,
- who speaks,
- the strategy,
- the tactics,
- maintaining contact,
- controlling the 'atmosphere',
- media coverage (?)

- Identify points of resistance (yours, theirs).
- Ideal settlements.
- Realistic settlements.
- Bargaining range.

THE NEGOTIATION — NEGOTIATE
- Listen & challenge.
- Record & analyse.
- Keep faith, avoid loss of face.
- Split small differences.
- Keep confidences.
- No withdrawal of offers → Unless a completely new package is to be negotiated.
- Agree implementation.
- Seek face-saving formula (when necessary)
- Look for trade-offs, fringe benefits.
- Avoid defend-attack spirals.

IMPLEMENT - leading to:
- Written statement of the agreement.
- Commitment by both parties.
- No going back.

NEGOTIATION CYCLE



PAPERS - Outlines
2.37 Basics of Negotiation
2.38 Aspects of Negotiation

CONFLICT MANAGEMENT

* TYPES OF CONFLICT
* 3 PREMISES CONCERNING CONFLICT
* MANAGING CONFLICT

TYPES OF CONFLICT

- Due to mis-communication or mis-understanding → Resolved fairly easily by correcting the mis-understanding or communication
- Due to the existence of a REAL 'substantive' problem → SUBSTANTIVE CONFLICT
- Emotional or value-based conflict → VALUE-BASED CONFLICT

VALUE-BASED CONFLICT

- Basis is neither fact nor substance but usually lies in the 'values' of the parties in conflict. Resolved only by someone changing their values.
- Compromise likely by referral to a higher authority for a final ruling.
- Alternatively 'agree to disagree' when the parties understand & respect each other.

SUBSTANTIVE CONFLICT

May be resolved by creative problem-solving processes to produce one of two solutions :

- Structural Solutions,
- Behavioural Solutions.

B. solutions more difficult once negative feelings have developed which hinder communication & understanding.

- Re-establish communication & understanding to resolve the conflict.
- Simply remove or re-structure the situation to remove the basis for the conflict, e.g. re-allocation of resources; separation of the parties in conflict.

3 PREMISES

(Blake, Shepard, Mouton 1964)

- Conflict is not inevitable but agreement is impossible → A
- Conflict is inevitable & agreement is impossible → B
- Conflict is inevitable but agreement is possible → C

A → A solution may be to withdraw and leave the conflicting parties to their own devices.

→ When the parties are seen as INTERDEPENDENT (as within an organisation) it is sometimes possible to increase their independence - a structural solution.

→ The measure of their INTERACTIVE processes decides if agreement is possible/impossible between them

→ This will vary depending on mutual.....

- ATTITUDES to each other (+ve or -ve)
- CONTACT patterns (formal & limited or informal & frequent)
- TYPE of joint decision making used (Bargaining to WIN:LOSE or problem solving)

B → Action will depend upon the stakes involved

- If there is little to be gained/lost, leave things, let conflict work itself out.
- If much is at stake, an impartial third party may be needed to arbitrate.
- If a great deal is at stake, the parties will fight it out anyway to a WIN:LOSE end.

C →

- In minor conflicts, agree to disagree.
- In moderate conflicts, work out a compromise bargain.
- When stakes are high, confrontation & collaborative problem solving can produce a WIN:WIN result.

MANAGING CONFLICT

- Even when handled with skill, conflict may have negative consequences.
- Confronted within a problem solving framework, it can lead to positive outcomes.

Conflict is a necessary part of life and should be seen/discussed outside the I.R. context. It can arise between colleagues & friends leading to growth & development, new ideas & practices, (+ve) or (-ve) outcomes.

ROLE CONFLICT & ADAPTIVE RESPONSES

ROLE - a set of expectations which people have about the behaviour of a person in an organisational position/job.

∝ Issue 1

* MANAGERIAL DEVIATION
* ROLE CONFLICT
* ADAPTIVE RESPONSES TO ROLE CONFLICT

DEVIATION

- No job description is 100% complete, covering every circumstance.
- Managers have areas/degrees of choice or discretion concerning actions they may take.
- Deviation from expected organisational behaviour is not all bad →

DEVIATION may be used:
- To NOT fulfill certain role obligations.
- To get greater control over subordinates (so that they 'owe' you a favour in return.)
- To build 'slack' into your operations.
- To acquire resources with which to work.
- To build up one's own position to do a better job for the organisation.

ROLE CONFLICT

A manager may be a member of different sets (or groups) within or without the organisation.

- Each set has different expectations of the manager's behaviour (role) → - Our own behaviour is influenced by the roles we see ourselves filling at any time.
- ANY action is likely to breach the expectations of one or more of the manager's role sets.
- A perceptive manager is aware of this potential for conflict → - Both in formal-task role & self-image role eg. a manager having to fire a subordinate while having a 'nice guy' self-image →

- Where these roles are congruent, no problem exists.
- If there is NO congruence, expect tension, strain, discomfort & insecurity to increase leading to an adaptive response &/or changing of one's self concept.

ADAPTIVE RESPONSES to potential conflict :-

- Use deception or deviation.
- Stall, until the need for action has diminished → - The need for action usually diminishes with time.
- Use rituals to reduce other's expectations of you → - Excessive politeness or formality reduces friendship expectations or personal regard.
- Use screening devices → - Claim to be acting as agent for absent principals.
- Succumb to illness or personality disturbances.
- Psychologically withdraw from your present job → - Or quit for another job.

THE ROLE OF CONFLICT IN INDUSTRIAL RELATIONS

- ✳ HOW & WHERE DOES CONFLICT ARISE ?
- ✳ TYPES OF CONFLICT
- ✳ WAYS OF HANDLING CONFLICT
- ✳ ADVANTAGES OF CONFLICT
- ✳ DISADVANTAGES OF CONFLICT

CONFLICT ARISES
- Between groups within an org^{n} or society at large.
- Through the formulation of rules to govern their behaviour.
- Through the imposition of rules on the behaviour of groups.
- Through the differing interpretation of the rules by the groups.
- Through the need/want to modify the rules by one or other of the groups

WHY HAVE RULES
Societies develop rules & procedure to govern behaviour & avoid anarchy and confusion.

WHAT SORT OF RULES ?
- Normative - possibly unwritten, governing behaviour between or within groups.
- Substantive - identifies rights of individuals or groups; obligations; terms & conditions of service; etc.
- Procedural - concerned with power & authority & how to conduct activities, negotiations, etc.

RULES SHOULD BE
- clearly stated,
- fair & reasonable,
- explained to all,
- subject to revision.

TYPES OF CONFLICT
- Open.
- Suppressed/ hidden.

HANDLE CONFLICT
Through management & Trades Union's :-
- Communication.
- Consultation.
- Participation.
- Negotiation.

WHY HAVE T.U.'s ?
- To manage 'conflict' on behalf of individuals at domestic, local &/or national level.
- To monitor terms & conditions of work for specific groups of persons.

ADVANTAGES OF CONFLICT
Recognise the inevitability of conflict & don't avoid it. Can lead to :-
- better understanding of each others position.
- it energises change & creativity.
- motivation & stimulation of groups.
- constructive & legal changing of the status quo.
- better terms & conditions for participating groups.

→ - New rules.

DISADVANTAGES
Conflict in an organisation is dysfunctional when it :-
- absorbs organisational effort & resources without producing anything,
- deflects attention from basic purposes,
- leads to actions which subvert primary organisational objectives.

→ **UNRESOLVED CONFLICT** leads to:
- Dissatisfaction between/within groups.
- One party perceiving itself as disadvantaged (a second party disagrees)
- Unproductive dissipation of energy by the disadvantaged',
- Us : them syndrome; posturing & taking attitudes.
- Lowering of morale; loss of production; high staff turnover; indiscipline etc.

See Papers
6.23 Industrial Relationships.
6.24 Complaints & Grievances.
6.27 Anatomy of Conflict.
3.25 Consent & Control.

THE CONSULTANT'S TASK IN REDUCING CONFLICT

* PREREQUISITES
* SETTING UP A MEETING

PREREQUISITES Talking informally to the parties in conflict, the consultant needs 3 'YES' answers.
- Is the conflict harming the org.?
- Have each party an interest in relieving the conflict?
- Are they willing to work out their differences?

Then there is value in intervening

If the product of conflict is:
- to clarify objectives,
- to generate extra effort,
- to create a sense of urgency, or
- to give clear identity to groups or individuals....

...you may well want to leave the conflict alone!

- With skilled & trustworthy help.
- The consultant would 'hold' the parties to their word with a confidential written statement if necessary.

SETTING UP A MEETING

The objective of the meeting is mutual perception, so:-
- Prepare the parties separately
- Conduct the meeting
- Control the debate
- Work constructively towards an outcome
- Possible outcomes

PREPARING
- Explain the format and objectives of the meeting.
- Each party considers their answers to 3 questions
  - How do we see ourselves in relation to the others?
  - How do others see us?
  - How do we see others?

THE DEBATE
- A lively meeting will ensue as perceptions are exchanged & explained.
- Allow repressed emotion to release but not explode.
- Consultant keeps cool & objective & neutral. Accept becoming the butt of aggression.
- Use 'moderates' to cool the 'hard-liners'.
- Keep everything light & good humoured.

CONDUCTING THE MEETING
- Check the room (& equipment) & correct an errors. (flipchart/pens)
- Arrange seating in the round.
- Reserve focal position for self.
- Mix the parties to blur identities.
- Welcome them & re-state the meeting objectives.
- Re-assure them concerning privacy & non-attrition.
- Invite frankness but keep the atmosphere light & friendly.
- Introduce the 3 questions.
- Invite a presenter from each group to take the meeting through their prepared answers.
- Record the answers on chart.

POSSIBLE OUTCOMES
- Realities replace fantasies.
- Identify mutual interests.
- Identify factors which threaten collaboration.
- A move towards problem solving together

If necessary, divide them into their groups again to consider:
what activities the other should do.... more of...
.... less of....
then reconvene the meeting & continue as before.

BEING CONSTRUCTIVE
- They are pleased to hear their good features from their opponents.
- Relieved that criticism is made constructively.
- Pleased with the opportunity to voice their feelings for the others.
- Satisfied the meeting was comf'table.

THE DIFFUSION OF INNOVATION & CHANGE 1 (of 2)

IN ORGANISATIONS

* ✳ DEFINITION OF DIFFUSION
* ✳ DIRECTED DIFFUSION
* ✳ REQUIREMENTS FOR SUCCESSFUL DIFFUSION

DEFINITION OF DIFFUSION

- **SCIENTIFIC** :- the movement of energy; objects; chemicals; etc. down a gradient from a high level or concentration to a point at a lower level or concentration.
- **ROGERS** (1962) The human interaction in which one person communicates a new idea to a new person.

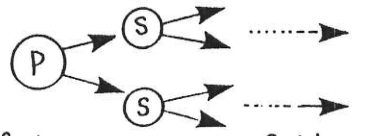
EXAMPLES

- Gases diffuse from high concentrations to a lower one.
- Heat energy travels from objects at high temperatures to cooler ones.
- Winds move from high pressure areas to low pressure areas.

Requires :
- a new idea or innovation,
- Person A who knows about it,
- Person B who doesn't know about it.

A MODEL OF DIRECTED DIFFUSION

- Centre-periphery model.



- This model implies a directed diffusion, centrally managed

Assumptions

- The innovation to be diffused already exists.
- The direction of diffusion is from the 'centre' out to 'users'.
- The process is being managed.

REQUIREMENTS

- Adequate levels of resources/ energy at the Centre (support)
- A satisfactory management/ technological infrastructure.
- An effective information dissemination & communication network → 2-way communication process.
- Movement of information → From Primary Centre ⇄ Secondary Centres ⇄ Periphery (Feedback / Feedback)
- Primary centres support & manage secondary centres
- Secondary centres engage in the diffusion of innovation & change.

MANAGE & SUPPORT

- Trains trainers.
- Establishes the method of diffusion.
- Deploys 'missionaries'.
- Monitors progress
- Interprets the feedback.

EXAMPLES OF DIRECTED DIFFUSION

- **Historical** - Colonisation; Christian missionaries; Imperialism; Communism.
- **Recent manifestations** :- Application of marketing techniques; eg. franchising Spread of new technology in business; eg. computers etc.

THE DIFFUSION OF INNOVATION & CHANGE 2 (of 2)
IN ORGANISATIONS

* ROLE OF PRIMARY CENTRES
* HOW TO RECOGNISE FAILURE
* POTENTIAL CAUSES OF FAILURE
* IMPROVING DIFFUSION

ROLE OF PRIMARY CENTRES

- Source & guardian of doctrine/ methodology / resources / innovation.
- Selects, trains & develops agents of diffusion & innovation → - The 'missionaries'
- Supports secondary centres → - Capital, - information, - know-how.
- Monitors & manages decentralised operations → - Sets performance criteria. - Monitors performance. - Oversees leadership in secondary centres.
- Maintains information throughout the network.
- Maintains a relatively stable technical system.

RECOGNISE FAILURE

- Primary centres lose control of secondary centres.
- Communication network disintegrates.
- Secondary centres gain independence OR decline OR assume primary centre role.
- Diffusion system fragments.

POTENTIAL CAUSES OF FAILURE

Ineffective diffusion may be due to:-

- Overload of capacity at primary & secondary centres.
- Distortion of 'the message'.
- Mishandling feedback from the periphery.
- Inadequate resources against the demands imposed.
- Introduction of new infrastructure technology.
- Lack of motivation of the agents of diffusion (the missionaries).
- Secondary & peripheral centres alienated from the primary centre.
- Central organisation seems unresponsive to local (peripheral) requirements.

IMPROVING DIRECTED DIFFUSION

- Influence opinion leaders (for product or techniques)
- Link them with precipitating events of a social or technological nature.
- Improve central management & co-ordination (for business systems) → - Formalise informal structures which work well.

ERCEPTION & ORGANISATIONAL BEH...IOUR

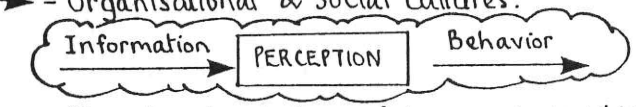
- ✳ LINKS BETWEEN PERCEPTION & BEHAVIOUR
- ✳ MECHANISMS OF PERCEPTION
- ✳ FACTORS WHICH MOULD PERCEPTION

LINKS Organisations are intended to bring about integrated behaviour.
- People think they 'see' what may/does not exist.
- People act on the basis of what they 'see' or perceive.
- What people perceive may alter their behaviour
  - It will influence the organisation
  - Conversely the organisation can influence individual's perceptions.

A basic human need is to understand our world. Thus perception leads on to understanding, attitude building & it colours behaviour. Governing perception of 'control over our environment' & the visibility of power relations.

FACTORS
- Stress
- Group pressure
- Interactions
- Role
- Reference groups
- Organisational position

MECHANISMS
- On seeing/receiving a stimulus we perform an interpretive step → Give it 'meaning'
- Meanings, or common interpretations, are coloured by our culture → Organisational & social cultures.
- We are sensitised to stimuli above certain threshold values.
- Based on limited facts, we attempt 'CLOSURE'
- Once closure has occured, this organisation of perceptions may persist for long periods.



- A natural & useful procedure which speeds understanding & comprehension normally.
- FINE → if images are reasonably consistent.
- Potentially misleading in organisations where previous learning may colour perception.

ORGANISATIONAL POSITION
- Persons in marketing & selling see organisational problems as marketing problems.
- Hierarchical position gives one a 'vertical' scale of perception.
- Departmental position gives one a corresponding 'horizontal' scale of perception.

REFERENCE GROUPS
- People use reference groups to classify & guide perceptions.
- Normative function, group serves to guide one's perceptions prior to entry to the group eg. one's 'peers'.
- Comparison function, used to evaluate oneself though without thoughts of entering it, eg 'superiors'.

INTERACTION
- By interaction we improve the accuracy of our perceptions.
- Leadership styles can influence perception
  - Democratic, people conceive & offer new ideas based on their perceptions.
  - Autocratic, may reduce new ways of doing things.

ROLE
- Interpretation of behaviour depends on the perceived ROLE of the person doing the action.
- People in organisation may fulfil multiple roles.
- Difficulties arise when the organisational role is seen differently by other organisation members.

STRESS
- Under stress conditions, 'closure' occurs more quickly & may produce less accurate impressions.

GROUP PRESSURE
- Support from group members leads to conformity.
- Concrete physical stimuli easily leads to conformity.
- Nebulous, abstract things produce less conformity.
- Perceptions may alter/be altered.

THE STAFF FUNCTION 1(of 2)

* ✳ WHY HAVE A STAFF FUNCTION ?
* ✳ ADVANTAGES OF A STAFF FUNCTION
* ✳ TYPES OF STAFF

WHY ?

- The range of decisions required of top executives is so broad there are bound to be areas of unfamiliarity.
- Programming part of the managerial work & assigning responsibility represents the institutionalisation of managerial functions.
- Other managers can then be excluded from doing that which has been assigned to a specialised staff department.

If the managerial function is conceived as a set of activities, they can be more effectively carried out by division of work leading to a specialisation of managerial labour - line or staff

∝ Issue 1

- Often a type of work or function grows in importance or volume such that it is desirable to have the advantages of division of work & to adopt special procedures.
- Where it detracts from the role of line management, it may be interpreted as Job Impoverishment

ADVANTAGES

- If certain managerial jobs can be programmed & done repeatedly, it is worthwhile finding the best way.
- One (or more) person(s) has the opportunity to build specialised knowledge and skills to perform the task.
- Execution of the task no longer depends on an executive's individual skills.
- The organisation is less dependent on the tenure of any one manager.

TYPES OF STAFF

- Assistant-to
- General staff
- Specialised staff
- Operating services

ASSISTANT-TO

- Aids his/her superior in handling their own executive office.
- Frequently a go-between for other executives as is expedient or convenient.
- Needs to learn a great deal about the organisation & the executive.

GENERAL STAFF

- Frequently found in governmental organisations, less in business.
- Staff roles are concerned with running this office & are extensions of the office holder making them more effective.

SPECIALISED STAFF

- Serve the entire organisation or large sectors of mgt.
- Personnel receive considerable training to qualify for the posts & it may be their career eg. accounting; training; personnel; etc.

OPERATING SERVICES

- Specialised staff facilitates the work of management in the physical sense. Custodial in nature eg. stores, canteen, etc.
- Does not change the role of line management.

The classification, line or staff depends upon its relation to organisational goals. Staff positions & departments are often assigned the operation of procedural systems. Line positions are concerned with production of goods / services.

THE STAFF FUNCTION 2 (of 2)

'Staff' personnel services give results when tasks frequently take on considerable complexity e.g. labour relationships or payment of employees. Large numbers of persons may be involved leading to the problem of how to organise them.

✳ PURPOSE OF STAFF

No clear-cut definitions exist. They include :-
- Facilitating organisational control & co-ordination
- Resource acquisition & maintenance
- Agents for organisational adaption
- Advice & services

- On an individual basis to management executives.

Taking over procedural systems like budgeting, accounting, training, etc. where growth needs suggest division of work would merit it.

Includes acquiring capital; manpower resourcing; legal negotiations; etc as well as machines & building maintenance

Businesses adapt & evolve in a social, technological & economic environment. Staff functions to :
- appraise internal & external conditions & make recommendations for change or modifying organisational goals.
- they perform an intelligence function & propose basic policies on the intelligence gathered.
- they facilitate economic forecasting & long-range planning, etc.

✳ DIVISION OF STAFF ACTIVITIES

Organisation of staff activities may be by :-
- Purpose
- Function
- Level within the organisation
- Area of operation

- What service is delivered to the parent organisation ?
- Within the service offered to the parent organisation.
- Top, middle management or worker levels.
- Geographical or departmental.

✳ ALLOCATION OF STAFF WORK ACTIVITIES

- Execution of activities
- Set up, facilitate & execute staff work
- Institutionalise staff activities

Subservient to line activities, low order activities needing low order skills & training. Eases work pressure on line managers.

Higher order activities involving (say) designing forms to facilitate uniformity of procedures → Examples :- for recruiting & selecting; indenting for supplies; paying staff; marketing & advertising products; etc.

Developing new programmes autonomously within the parent organisation.
- Beginning means-end analysis of staff work.

✳ LOCATION OF STAFF UNITS

- Where the need is greatest
- Where service is most important
- Where it operates most effectively

- Staff assigned to division or hierarchical level.
- Example :- economic analysts to the top of the org^n.
- The more important the service, the higher in the organisation.
- Example :- quality control function within the engineering department where the purpose of this staff function is best understood & utilised.

LINE-STAFF RELATIONSHIPS

* STAFF 'THREAT' TO LINE MANAGERS
  - As line managerial functions are re-designated staff responsibilities, line manager's job is impoverished
  - Institutionalisation of procedures means a line manager's unique personal skills are less important.
  - Line managers work in more restricted areas of activity
  - Careers, & positions attained by long service are progressively less important & influential

Organisations divide operational goals through a means-end analysis into sub-goals progressing down the hierarchical structure. Units evolved from these analyses are called LINE units. Traditionally staff functions were subservient to line managerial activities until the need for special handling procedures arose. LINE management preceeded STAFF management

- Now where do boundaries of authority lie?
- More subject to control & supervision.
- Job holders feel threatened, less able to defend themselves & their roles.

* STAFF AS A SOURCE OF CHANGE
  - Often instrumental in planning & instrumenting change.
  - Line managers are less involved in planning & possibly less committed.
  - Negative feelings engendered if security is perceived as threatened.

* STAFF POSITION ASTRIDE CHANNELS OF COMMUNICATION
  - Information is POWER.
  - Controlling info^{n} channels is POWER.
  - Staff communicate widely both vertically & horizontally.
  - LINE perceives STAFF as 'all pervading'.

* STAFF-LINE DIFFERENCES
  - Modern staff appointees are usually specialists &/or graduates.
  - Probably younger, possibly more highly educated than line managers with whom they deal.
  - Line managers may perceive themselves as inferior in some way.

* STAFF REWARD SYSTEMS
  - Staff personnel spend most time in an environment oriented to their professional speciality.
  - Staff behave to seek acceptance by peers, & promotion in their specialist area.
  - Staff may insist on maintenance of standards & rules of their professional area rather than bend to satisfy immediate line requirements.

Conflict is dysfunctional when it absorbs organisational efforts & resources without producing anything.

PAPERS
The Staff Function 1 & 2
The Anatomy of Mgt. Structure 1,2

α Issue 1

THE ANATOMY OF MANAGEMENT STRUCTURES 1 (of 2)

* PURPOSE OF MANAGERIAL STRUCTURE
* IMPLICATIONS FOR CO-ORDINATION
* SATISFACTORY SPANS OF CONTROL

PURPOSE It facilitates the:-
- Co-ordination of the work of the organisations operating systems & work units
- Definition of organisational & sub-unit goals through planning activities.
- Allocation of resources.
- Motivation of organisation's members through the distribution of rewards.

The dominant characteristic is the pyramidal structure with organisational goals at top dividing into sub-goals at each level descending. The progression is developed by means-end analysis. Units evolved from this process are called **LINE UNITS**.

PURPOSES :- stress laid on these varies according to the level of management within the org^n. hierarchy.

IMPLICATIONS
- Unity of command
- Span of control

COMMAND
- Ideally, instructions would come from a single source.
- In practice, it is not always possible or desirable.

CO-ORDINATION :- commonly implies one person supervising and integrating the activities of others.

SATISFACTORY SPANS are governed by :-
- The need for close 1:1 supervision
- Degree of interdependence between work systems
- Similarity of subordinate's' jobs
- Discretion exercised by subordinate
- Capability of the subordinate.
- Perception of the superior concerning the subordinate.
- Environmental stability/instability
- Research findings concerning spans

Supervising functions could be assigned to an administrative system or rely on self- or group-control. as well as hierarchical control. The burdens are reduced & spans may be broadened.

SPAN OF CONTROL
- The number of subordinates reporting to one other person (superior).
- Reducing spans of control increases the number of layers of supervision.
- Increasing spans reduces the effectiveness of the supervision.
- Seldom uniform in size throughout an org^n.
- Spans become smaller higher up the org^n.

RESEARCH suggests efficiency & morale could **INCREASE** with broader spans & flatter management structures. since :
- Inability to supervise closely meant greater discretion & autonomy was permitted to subordinates.
- It enforced de-centralisation.
- It meant greater accessibility of top executives to day-to-day activities.
- It meant sharper differentiation between work of the superior & the subordinates.

JOBS – Supervisors must know what their subordinates are doing & how to do it.
- Where subordinates jobs are diverse spans should be narrow.

INTERDEPENDENCE The greater this is the greater the need for co-ordination.

INSTABILITY pulls & retains decision-making higher up the hierarchy & spans of control are kept small.

DISCRETION If the range of things to decide is small, large spans of control are feasible.
Example - time discretion before subordinate reports to a superior.
- If (say) hourly, range narrows as supervising load increases.
- If (say) weekly, range widens/load decreases

To specify the ideal size for a span of control is a gross over-simplification of a complex phenomenon.

Issue 1

THE ANATOMY OF MANAGEMENT STRUCTURES 2 (of 2)

* FACTORS INFLUENCING STRUCTURE VARIATIONS
* WHAT MANAGEMENT STRUCTURE ?

FACTORS INFLUENCING:-
- Degree of interdependancy
- Environment changes
- Group values

INTERDEPENDANCY of work subunits or systems :-
- Low (eg. decentralised retailers) - large spans are possible with flat organisational forms.
- High (eg. airlines, automobile factories) - narrow spans & peaked structures; more use of administrative systems to promote interaction ; extensive hierarchical control.

VALUES held by individuals or groups of individuals with common training & outlooks will colour :
- the structure they support,
- their attitudes & sentiments.

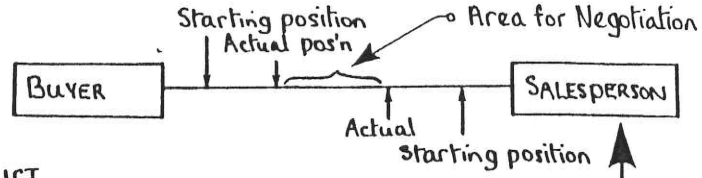
(Contrast a local authority bureaucracy with a fast-growing, hi-tech, scientific research company.)

ENVIRONMENT
- Long-term changes eg. consumer purchasing patterns or new technology will cause organisations to alter their structures - the better to accommodate the changes.
- Short-term changes eg. legislative & economic variations. Co-ordination & control are time consuming activities as communications pass ↕ or ↔ within organisations. Routine C. & C. is given to administrative systems with formalised programmes permitting uniform repetition. Responsibility is delegated downwards to formalised employees called 'STAFF.'

WHAT STRUCTURE ?

Managerial structure is the result of :-
- the needs of the organisation, dependent upon.....
  - its objectives,
  - the conditions it faces.
- its capacity to cope with the above needs using....
  - its resources,
  - organisational processes.
- the resulting structure reflects the intimate inter-relation of technical, political & economic elements.

THE SELLING INTERVIEW 1 (of 2)



✳ PRE-INTERVIEW PREPARATION

Requires that :-

- You know your product & what you are selling
- Identify areas where you can negotiate
- You know your competitors
- You research the customer &/or his/her organisation
- You prepare the actual presentation

YOUR PRODUCT

- U.S.P.'s of the product / service offered.
- Benefits of ownership / involvement.
- Your company's image, brand & reputation.
- Your company's trade practices.
- Current levels of stock & availability.
- Customer profiles.
- Current market trends.

Is this information available on leaflets or brochures with up-to-date examples & prices.

AREAS FOR NEGOTIATION

- Discounts for quantity; cash; trade buyers; promotions; etc.
- Payment methods - H.P.; leasing; is credit available?
- Advertising & promotional support; point-of-sale displays; local or national campaigns, etc.
- After-sale support; services; spares; etc.
- Installation & commissioning plant & operator training.

YOUR COMPETITORS

Competitor intelligence covers :

- The product range & services offered.
- Their U.S.P.'s; major advantages or disadvantages
- Current marketing strategies; market share; etc.
- Their prices & areas of negotiation.
- Market trends
- How we compare - favourably or unfavourably.

THE PRESENTATION

Plan what to do & prepare a strategy

- What to say. Plan your questions as well as the 'talk'. Seek 2-way communication. What notice will you take of the answers? What clues will you seek to indicate a 'sale'?
- What to show. Use the real article, brochure or pictures? Film, video or 35mm slides? Can you demonstrate the item/service? Have testimonials from other customers.
- What to do. How best to use the client's time?

YOUR CUSTOMER

- Their perceived needs.
- Their circumstances.
- Previous purchases (if any).
- How big is their organisation?
- How busy are they?
- Are they good payers; any outstanding debts; etc.

U.S.P.'s - Unique Selling Points

THE SELLING INTERVIEW 2 (of 2)

* THE INTERVIEW
* PRESENTATION SKILLS
* CLOSING PLOYS

THE INTERVIEW Remember 'AIDCA'.

After opening courtesies.....

- Establish the client's perceived needs & the best solution to them
- Create interest in your product (or service)
- Create confidence in your product (or service)
- Use selling phrase(s)
- Counter objections
- Start to close the sale

A.I.D.C.A.

Gain the client's ATTENTION and INTEREST. Then stimulate a DESIRE to own the product (or take advantage of the service). Build CONVICTION that they need what you are selling & finally lead them to ACTION when they buy.

PRESENTATION SKILLS

- To establish rapport, use their language.
- Involve the customer in the presentation if possible.
- Appeal to his/her senses & encourage feedback.
- Do not neglect interaction skills :
  - negotiating skills,
  - listening skills,
  - questioning skills,
  - paralinguistic skills,
  - non-verbal communication.

CLOSING PLOYS

- Offer alternatives
- Valid reason for deciding today
- Ask directly for an order.
- Discuss ways of paying.
- Assume agreement.

- "Would you like X or Y ?"
- "Special offer, ends shortly."
- "This price until stocks are exhausted."

- Suggest a 'trial'.
- Listen for 'cues'.
- Ask for a decision.
- Ask for an order.
- Make it easy to say 'YES'.

SELLING PHRASES

- Link price with features & U.S.P.'s ; benefits ; etc.

OBJECTIONS

- On price, stress the benefits & added features.
- On competition - stress U.S.P.'s ; back-up services ; etc.

'CLUES' to LISTEN FOR

- 'How long to deliver ?'
- 'What discounts are available ?'
- 'What sizes ; colours ; etc. ?'

Remember : People don't buy products, they buy benefits & intangibles like reliability, status, peace of mind, etc.

Use questioning techniques (OUTLINE 5.04)
- CLOSED questions.
- OPEN questions.
- etc.

CREATE INTEREST

- Emphasise U.S.P.'s.
- Sell the benefits of ownership.
- Relate benefits to their needs.

CREATE CONFIDENCE

- Exhibit the product & product knowledge.
- Demonstrate U.S.P.'s if possible.
- Use literature & test reports for support.
- Use testimonials when possible.
- Change 'I want...' into 'I need ....'

SALESMANSHIP The ability to maximise the selling opportunities whilst creating and maintaining the goodwill of the prospect.

SELLING THROUGH 'CLASSIFIED' ADs 1 (of 4)

* WHY HAVE CLASSIFIED ADs.?
* WHY CLASSIFY ADVERTISEMENTS ?

CLASSIFIED ADVERTISING is a service offered by newspapers, magazines & journals for small, low-cost advertising where the advertisements are grouped together & sectioned according to their subject matter.

WHY 'CLASSIFIED'?
Classified advertising offers a service :-
- To the advertiser
- To the reader
- To the paper

WHY CLASSIFY ADs ?
- For readers
- For the publication
- For the advertiser

TO THE ADVERTISER
- A ready-made market
- A constant volume of potential customers
- Attracts more customers- means more business.
- Administrably useful

VOLUME
Circulation figures & readership (usually known) gives a measure of potential exposure of ad.

MARKET
- Newspapers & journals go into homes & businesses within the circulation of the publication.
- Advertising in specialist journals (carefully chosen) reduces waste & increases effectiveness.
- A readership of interested persons is guaranteed.
- The advert remains effective until the publication is discarded

Newspapers - short life/large exposure.
Journals - long exposure but to limited readers, BUT interested in the subject matter.

ADMINISTRABLY USEFUL to be able to calculate from sales returns, costs and readership if advertising is cost effective.

TO THE READER
- Saves time, effort & money shopping directly for goods & services from home or business place.
- Readers come to expect it, added interest to the publication.
- Generates ideas to improve comfort/facilities at home or business.
- Comparison shopping possible.

FOR ADVERTISER
- It indicates market trends.
- It segments the market.
- It focuses sales efforts
- Permits accurate accounting of return on investment.
- Leads to comparability of pricing of goods, services, salaries, etc.
- It satisfies a demand.

FOR READERS
- It gives a feel for current prices; wage rates; employment opportunities; etc.
- A market place with many stalls.

FOR PUBLISHER
- A measure of reader interest, and advertiser's value on their publication
- A source of ideas for editorial material.

TO THE PUBLICATION (PAPER)
- Added interest.
- Produces revenue since £'s per column-cm is greater than for display ads.
- Creates a bond with the readership.

CLASSIFIED ADVERTISING
Definition :- Professional selling - in print - multiplied by the readership of the publication.

SELLING THROUGH CLASSIFIED ADs 2 (of 4)

INTRODUCTION TO COPY

* BASIC REQUIREMENTS OF AN Ad
* COPYWRITING - WITH THE READER IN MIND
* GETTING RESULTS FROM COPY

DEFINITION OF 'COPY' The transference of an idea from one person to another with enthusiasm & excitement, which makes the reader act favourably in favour of purchase.

BASICS OF AN ADVERT. The six 'musts' of an advertisement :-

- It **MUST** get results for the advertiser.
- Reader **MUST** absorb the message
- It **MUST** appear frequently enough
- It **MUST** command attention
- It **MUST** pass the selling message
- It **MUST** make buying easy

- To stimulate a response it must **COMMUNICATE**
- To reach the necessary number of prospects.
- Of all who are likely to buy the product/service.
- Convincingly,
- Quickly,
- Effectively.
- The reader/prospect should not have difficulties to overcome.
- Assume buyers are lazy, so make buying easy.

COPYWRITING
Each advertisement should (have) :-

- Empathy,
- A strong message
- Be specific
- Be interesting
- Be original
- Involve the reader
- Be credible
- Be concrete
- Use repetition

- To hold the reader's attention.
- About details of the product/service.
- Not too technical though.
- Try to make familiar subjects fresh & appealing.
- Invite them to match their needs to the benefits offered.
- Be truthful, don't exaggerate.
- No vague statements.
- A good ad. deserves repeating for increased impact.

GETTING RESULTS
Good copy will :-

- Scream benefits - whisper cost.
- Clearly lay out the message
- Help buyer to discriminate & get max. value for money.
- Make a quick sale
- Justify the cost of the product/service
- Create a need in the buyer's mind

- No need for the reader to have to deduce anything.
- More profit to the seller.
- Needs convert to a 'want to buy'.

SELLING THROUGH CLASSIFIED ADs 3 (of 4)

STRUCTURING THE ADVERTISEMENT

USE I.D.E.A.

I - INTEREST

- Before a sale is possible, arouse INTEREST.
- INDEX WORD is the lead in lineage advertisements e.g.
  - Bicycle, [illegible] etc.
  - Pram, [illegible] etc.
- Semi-display's use ATTENTION STOPPERS
  - Self interest (what's in it for me?)
  - New / News (it is new, it may interest me....)
  - Curiosity (read on & find out...)
  - Name/Prospect (...if it's prestigeous)

D - DESIRE

- Hold the interest. Be quick - it wont last.
- Stimulate DESIRE to possess, or take advantage of .....
- Spell out
  - the SELLING POINTS eg. technical features.
  - the BENEFITS to be gained after buying.
- Copywriter helps reader to rationalise using LINK WORDS ('you get this, WHICH MEANS.....')
- Change the reader's 'I want....' into 'I need....'
- An emotive buying decision is followed by rational justification.

Use emotive, compelling, informative words.

E - ENTHUSIASM

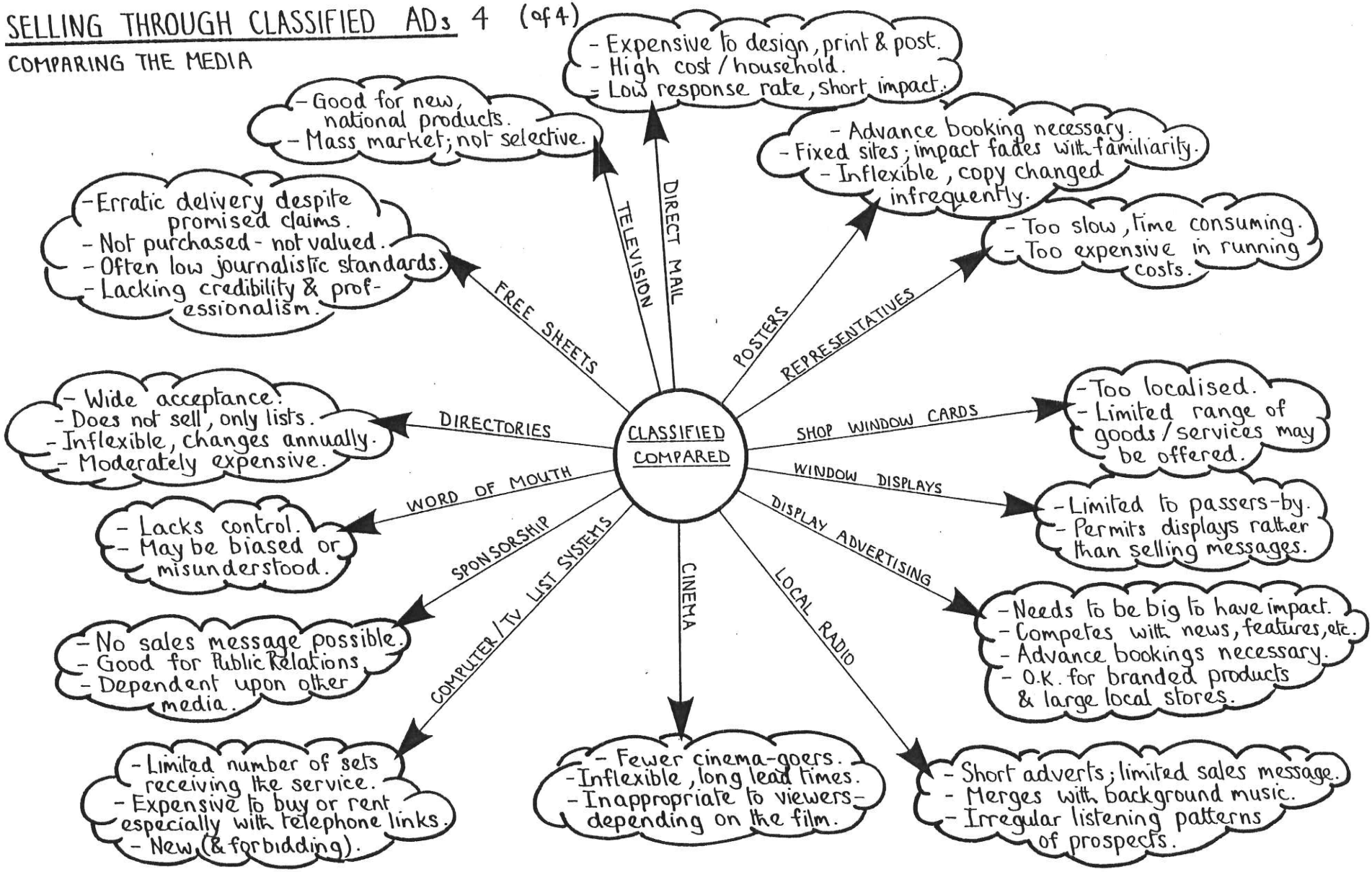
- Maintain the impulse to buy the product/service.
- Use :
  - Selling Phrases linking price & details. (CML = Competitive Market level prices may come from scrutiny of your publication's own classified columns)
  - Elimination phrases to filter responses. ('...only drivers need apply...')
  - Highlight Unique Selling Points (U.S.P.'s) of the product / service.

A = ACTION

- Make it easy for the reader to respond & buy.
- Use ACTION PHRASES like...
  - 'Phone this number today'
  - 'Clip the coupon & .....'
  - etc
- Be sure to tell them all important details.
  - Who; where; when; why; which; how; how much; etc.

SELLING THROUGH CLASSIFIED ADs 4 (of 4)

COMPARING THE MEDIA



SELLING TO THE CONSUMER SECTOR 1 (of 2) STORE SELLING

* CATEGORIES OF SELLING
* SHOP/STORE PHILOSOPHY
* MAINTAINING EMPLOYMENT STABILITY
* SHOP/STORE SKILLS

CATEGORIES

- Consumer approach - customer comes to the salesperson. (Shops; markets; department stores)
- Salesperson approach - salesperson goes to the customer. (Direct mail; house-to-house selling, etc.)
  - Home improvements,
  - Life insurance,
  - Cosmetics,
  - Plastic kitchenware,
  - etc.

PHILOSOPHY

Customers have certain expectations of the vendors which need to be recognised & catered for as well as their statutory customer rights :-

- Concerning their range of prices
  - Low - markets.
  - Medium - stores.
  - Med/high - boutiques.
- Concerning the specific quality of products on sale.
- Concerning the type of fashion or style of product.
  - Modern/traditional.
  - Upmarket / downmarket.
- Discount houses or stores
- High fashion/up-market stores
- Create store 'traffic'

EMPLOYMENT STABILITY

The training function is important. :-

- To encourage shoppers to return, staff should be well-informed, courteous, polite, & patient.
- Such personnel encourage & later create 'traffic'.
- As they become more skilled & experienced, they require compensation which rewards sales performance.

STORE SKILLS

Trained store salespersons must :-

- Exhibit product knowledge & perform satisfactory demonstrations.
- Differentiate between 'browsers' & potential sales prospects by questioning & optimise prime sales time.

Sales personnel's manner & approach must reflect the store's overall philosophy & reputation.

DISCOUNT HOUSES - customers may expect :
- value for money, but
- fewer services.

FASHIONABLE STORES - customers may expect :
- personal service,
- charge facilities,
- home delivery,
- etc.

Stores create **TRAFFIC** such that :
- shopping is enjoyable,
- shoppers want to stay,
- shoppers would make multiple purchases.

To help create store 'traffic' & maintain it, salespersons need training & motivation different from that of industrial salespersons or direct, door-to-door vendors.

SELLING TO THE CONSUMER SECTOR 2 (of 2) DIRECT SELLING

* HOUSE-TO-HOUSE SELLING
* SELECTING DIRECT SALES PERSONNEL
* MAXIMISING PRIME SELLING OPPORTUNITIES

HOUSE-TO-HOUSE SELLING

- Products should be of high quality to merit this rather than a shop sale.
- Manufacturer has lower advertising & sales promotion expenses.
- Manufacturer has higher salary, bonus & commission expenses.
- Manufacturer's sales philosophy & reputation should give the consumer confidence
- The duties of salespersons unrelated to selling should be minimised eg. paperwork; invoicing; etc.

- Exchange or money-back.
- Fair treatment for customers. (Observe all legislative requirements).

DIRECT SALES PERSONNEL

Such selling attracts a particular type of person.

- Successful salespersons are entrepreneurs.
- They are competent at selling.
- They are determined.
- Their remuneration reflects this (Screening potential salespersons is one important role of the sales manager prior to employing them.)

- It should be substantial to reward increased performance.

MAXIMISING OPPORTUNITIES

They MUST :-

- Close a sale each visit → - Otherwise prospects will purchase later, at a shop!
- Not be discouraged easily → - Many doors may be closed on them.
- Be skilled at prospecting for sales leads → - The best leads come from satisfied customer's recommendations where:...
  - customers identify prospects from friends & acquaintances.
  - satisfied customers become opinion-leaders. → When others buy, this customer feels his/her own purchase was justified.
- Be skilled demonstrators of the product or service

- In the prospect's home, without interruptions, with family &/or friends present.

Advances in electronic communication may mean big advances in home selling will soon develop.

SELLING GOODS (or SERVICES) FOR PROFIT

* SELLING GOODS (TANGIBLES) & SERVICES (INTANGIBLES)
* MANAGING SELLING

DEFINITION :- Salesmanship is the power or ability to influence people to buy at a mutual profit that which we have to sell but which they may not have thought of buying until we called their attention to it.
(J. Knox 1921)

- No person buys a 'thing', they buy the utility of that 'thing'.
- Something is purchased because a person has a need
- The 'thing' purchased fulfils the need

- Maslow showed people work to fulfil needs. He ranked them in a hierarchy. Products may be classified by where they fit into the hierarchy & then be channeled to the segment of the population that has the greatest needs.

MUTUAL PROFIT
Knox's definition implies both buyer & seller profit from sale. Selling is not a passive activity.

MANAGING SELLING
(This is the Sales Manager's function.)
- The sale price should adequately reflect the risk & uncertainty associated with selling a given product (or service)
- Establishing the selling style
- Establishing sales methods & techniques
- Training sales persons.

Selling at no (or low) profit (exceptional cases):
- 'Loss leaders', to pull persons into a store.
- 'Prestige selling' to a dominant or prestige organisation to impress & lead others to carry (or use) the product (or service).
- 'Buying in' for undistinguished products (or services) to establish a market share.

SALES METHODS & TECHNIQUES
Commonest are :
- Selling the benefits, features, advantages, U.S.P.s (Unique Selling Points) and so .....
- Creating conviction & then desire on the part of the potential purchaser, leading to....
- Action, & closing the sale.

SELLING STYLE may range across the spectrum from:
- Adversary selling, pressuring the customer & not taking 'NO' for an answer.
- Consultative selling, establishing empathy for the customer, determining needs then trying to fill those needs.

REQUIRES :
- Product knowledge.
- Ability to demonstrate product / service. (Easier with tangibles)
- Use of visual aids, etc. (More necessary with intangibles) to try & involve the prospect & make the right mental impression.

EXPO (EXHIBITION) SELLING 1 (of 3)

✳ WHEN TO EXHIBIT / SHOW

✳ PHYSICAL NATURE OF EXHIBITING

✳ PSYCHOLOGICAL NATURE OF EXHIBITING

WHEN TO EXHIBIT ?

- When you can achieve a substantial return on investment.

(Hoping to 'do some good' is not good enough.)

- Identify potential cost factors.
- Identify potential 'return on investment' (R.O.I.) factors.
- Accentuate opportunities which magnify R.O.I.
- Develop ways to measure & evaluate results
- Identify pre-show, in-show, & post-show plans.
- Line management & production staff could usefully become involved in strategy development.

(LAST YEAR'S ACTIVITIES :- Use R.O.I. to establish new strategies & tactics for the next event.)

PHYSICAL NATURE

- Show/exhibition time has a fixed limit.
- Space is at a premium so every exhibit item should serve a purpose.
- Selectivity of contacts is fundamental to high R.O.I.
- Show strategy should control booth design.

- Not every caller should be given the same priority.

- Actual orders reflect a quantitative value.
- Most measures must be multiplied by a value factor to establish R.O.I.

PSYCHOLOGICAL NATURE OF EXHIBITING

- Callers / customers behave more as 'group members' than individuals.
- Consider flow patters of movement & book space wisely.
- Normal selling skills do not necessarily transfer to an exhibition stand.
- Business transacted need NOT be a function of the 'pace' of the show.
- Exhibition staff can become 'exhibit-bound' territorially

- Why spend all the time on the exhibit / stand ?
- Need you do all the business on the stand ?

(Staff & customers could move off the exhibit.)

Exhibiting should be part of the organisation's overall marketing strategy. Properly planned it becomes a highly effective way of advancing the organisation's marketing objectives.

EXPO SELLING 2 (of 3)

* WHAT WENT WRONG THIS TIME ?
* ISOLATING THE ELEMENTS OF THE DISPLAY
* COMBINING THE ELEMENTS

WHAT WENT WRONG ?

- Inappropriate or immeasurable objectives ?
- Stand design
- Absence of a selling 'script' ?
- Failure to differentiate between customers.
- Expo goals & action plans not communicated to all personnel
- Expo personnel untrained ?
- Ineffective follow-up activities?
- You ignored last year's lessons.

ELEMENTS OF THE DISPLAY

The elements are :-

- Colour scheme.
- Signs / message.
- Traffic patterns.
- Displays, etc.
- Information getting aids.
- etc.
- Furniture.
- Lighting.
- Literature.
- Personnel.

-They don't know what is expected of them in measurable quantities
- They don't know how to interact with prospects

- What to say & do to the visitors.
- What you want from exhibition contacts.
- Too busy giving information to gather information on customer's real needs.

- Did the stand lay out fulfil the exhibition objectives ?

COMBINING THE ELEMENTS

- What is the function of the exhibition ?
- How does each element contribute to this function
- Can you balance function & aesthetics when combining these elements ?

The end must determine the beginning.

- Is the message clear or obscure?
- Do expo. personnel use this element to support the D.A.S. ?
- Is this element worth the cost of including it ?
- Are the elements co-ordinated to support the message you are attempting to display ?

- What is the Defined Action Series ?
- Rarely are sales concluded at exhibitions. More frequently one raises awareness of the organisation and its products / services. Sales follow from after-show activities.

The keys to achieving desired performance lies in pre-show

- instruction &
- practice.....

.... and in-show coaching.

DEFINED ACTION SERIES (DAS)

The whole idea of exhibiting is to motivate show contacts to engage in a series of actions leading to a pre-planned conclusion.

EXPO SELLING 3 (of 3)

* ATTRACTING PROSPECTS TO THE STAND

Requires the stopping, holding & releasing of target customers in keeping with the pre-designed 'script':

- The WALL
- The HOOK
- The MAGNET

THE WALL

Personnel influence customers into the exhibit. So they must:

- be selective & influence pre-determined target customers.
- implies you don't just wait for callers.
- could imply siting your exhibit near to another major attraction.
- possibly involve reciprocal agreement with other exhibitors to recommend visits.

THE MAGNET :-

Draws customers to the exhibit. Could be:

- your product / service;
- colour, light, movement, etc.;
- handouts or giveaways;
- toys to play with
- professional talent

- Models, celebrity appearances, etc. must complement & not detract from your expo. strategy.

- If it moves the prospect through the D.A.S.

THE HOOK

Snares a customer's ego:

- use his/her name.
- ask a meaningful question.
- make & hold eye contact.

* THE FOLLOW-UP

Plan what will happen after the show :-

- Will sales calls be made?
- Will a mailing be sent out?
- Who will be responsible?
- How will it be monitored?
- Are they compatible with on-going business activities?

IS THE PRICE RIGHT ?

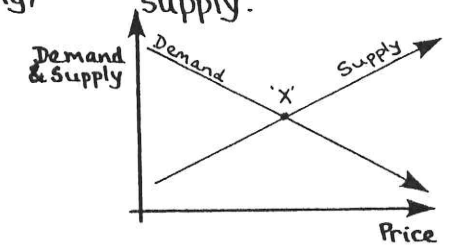
- ✳ WHY MUST YOU GET IT RIGHT ?
- ✳ CLASSICAL VIEW OF PRICE
- ✳ PRICING INTELLIGENCE
- ✳ SETTING PRICING TARGETS
- ✳ PRICING POLICIES

WHY ?
- To overprice your goods/service
- To underprice goods/services
- ★ What will the market bear ?

- Loss of profit
- Loss of custom to competitors
- Lack of business

CLASSICAL VIEW (Not universally relevant)
- Increased price reduces demand, but stimulates capacity to produce.
- Reduced price increases demand but inhibits productive capacity

Assumes :-
- perfect pricing intelligence.
- a fast response from consumer & supplier alike.
- a rational market.
- infinite flexibility to alter supply.



'X' = acceptable price

SETTING TARGETS
- Consider the company's
  - sales & market share,
  - return on investment,
  - reaction to competition.
- ★ What will the market bear ?

PRICING INTELLIGENCE from :-
- Objective observation of
  - breakdown of costs
  - competition → Their products; prices; policies; etc.
  - market trends & analyses.
  - product characteristics → Quality; packaging; perceived market position; servicing; availability; etc.
- Subjective observation eg.
  - Consumer perceptions
  - market research & surveys → Product image, needs, attitudes, etc.

- **ACTIVE** pricing policies → - Skimming (See Outline 3·39).
  - Market Penetration (See 3·39).
  - Discounting.
  - Premium pricing, just below competitors.
  - 'Slide down demand curve' to reach acceptable price 'X'
- **PASSIVE** pricing policies → By means of:
  - Agreements,
  - Cartels,
  - Political restraints,
  - etc.

PAPERS
Outline 3·39 - Fixing the Price

© Issue 1

9.28

MOTIVATING SALES PERSONS 1 (of 2)

* THE VALUE of a MOTIVATED SALES FORCE
* THE REALITIES OF MOTIVATION
* USING THE THEORIES

VALUE
- Objective achievement is enhanced.
- Maintains the company's position in the market place.
- Develops mutually profitable long-range client relationships, through
- Good personal client relationships.

REALITIES
- All motivation is, ultimately, self-motivation.
- Salespersons behave as they do for reasons of self-interest
- Incentives have short-term life spans.
- Understand & manage the individual's inner 'selves'
- Motivation is not a cure-all.

- Money, promotion, challenge, growth etc. Diverse persons will react differently to managerial incentives. Thus the value of a particular incentive will vary.

- It will not compensate for product deficiencies; poor planning; poor recruitment; etc.

THEORIES

A.H.Maslow - a satisfied need is no longer a motivator. Human needs are on-going, ever changing & interacting.

F. Herzberg - motivators make a person strive harder, satisfying hygiene factors only holds down dis-satisfaction.

D.McGregor - Theory Y assumes people want leadership which enables them to grow.

C.Argyris - people in organisations produce a behavioural 'system' built around self-protection which, left alone by management, demotivates & resists change

- Lower 2 layers are physical needs.
- Top 2 layers are intellectual needs.
- Can the company satisfy them all?

- Companies can expand territories & responsibilities; give freedom to manage them; permit decision-making; take on special assignments; etc.

- Sales management can influence that 'system' positively with opportunities for growth & self-actualisation.

THE INNER PERSON

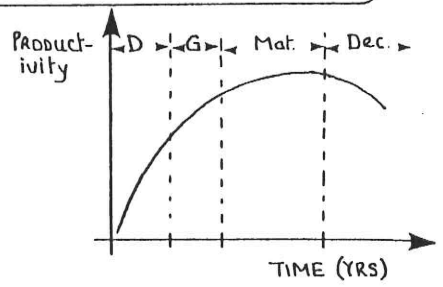
The 'mental being', moulded by life, associates & environment is influenced by daily learning experiences.
The 'spiritual being' formed by faith, religion, or whatever gives a person a set of values & rules for living.
The 'physical being' includes bodily well-being & appearance.

MOTIVATING SALES PERSONS 2 (of 2)

* SALES MANAGERS' TASK
* LIFE CYCLE PHASES
* MOTIVATIONAL PROFILING
* KEY MOTIVATIONAL AREAS

TASK
- Develop the sales person's self-awareness & affect their behaviour by motivation activities.

PHASES
Like products, companies & competitors, etc. people follow identifiable paths of :-
- Development,
- Growth,
- Maturity &
- Decline....in performance.



PROFILING
An on-going sales management activity tries to identify by observation & counselling :-
- Which staff are in which stage of their 'life cycle'
- The major needs of each phase.

(MATCH INCENTIVES TO NEEDS.)

Seeks, by questioning, to profile the sales person in the areas of :
- Status,
- Achievement,
- Ethics,
- Interests &
- Growth.

Counselling is only effective if manager & salesperson have mutual respect, rapport & confidence. This grows through :
- on-the-job coaching,
- by regular off-the-job counselling.

Sharing its purpose with the sales staff.

KEY AREAS
- Status - we all desire to look good in the eyes of those important to us
- Achievement - by their nature, successful salespersons desire to achieve
- Ethics - a primary motivator
- Interest in the job
- Growth motive - personal & professional growth - Maslow's top 'need' is highly personal & comes about by self-effort.

(PROVIDE OPPORTUNITIES FOR GROWTH.)

STATUS Material & abstract factors include good performance; job title; type of car; territory size; promotion; etc.

(STATUS ACHIEVEMENT MOTIVATES SALES PERSONS.)

INTEREST is engendered by remuneration & compensation, & the 'FUN' element. Enhance the work & fun elements.

(THE HIGHER THEIR INTEREST, THE HIGHER THEIR MOTIVATION.)

ETHICS. There must be congruence between the sales-person's 'moral code' & that of the company, their customers, their colleagues, etc.

(CONGRUENT ETHICS ARE POSITIVE MOTIVATORS.)

ACHIEVEMENT. Set personal goals which:
- are agreed with the individual sales-person & the manager.
- do not mutually conflict.
- are achievable but stretching & challenging.

(HELP THEM BECOME WINNERS IN THE EYES OF THOSE WITH WHOM THEY DEAL.)

COMMUNICATING WITH THE MARKET 1 (of 3) 'OUTWARDS'

* EFFECTIVE ADVERTISING
* UNDERSTANDING THE FUNCTION OF ADVERTISING
* SALES PROMOTIONS
* CLASSIFIED ADVERTISING (See OUTLINES 9.18-.21)

EFFECTIVE ADVERTISING is :-
- Knowing the proper function of advertising & using it to perform the appropriate job where it is more closely related to sales. (Communicating with the market is a 2-way process receiving intelligence as well as giving it.)

ADVERTISING :- Any paid form of non-personal presentation or promotion of ideas, goods or services by an identified sponsor.

FUNCTION OF ADVERTISING Know what it can & can not do. It is not the same for every company or product.
- Relating directly to sales
- To build store traffic in retailing
- In building brand awareness
- To influence attitudes
- To qualify the product in the mind of the buyer
- To defer sales & lower consumption

Mail order business links advertising directly to sales.

STORE TRAFFIC Practiced by supermarkets, stores & service industries like retail banking, car rentals, etc. where off-price incentives attract customers.

BRAND AWARENESS leading to brand preference mainly concerned with packaged goods where the packaging communicates.

INFLUENCE ATTITUDES with community products or services which are inter-changeable with other brands in its category eg. petrol; dry-cleaning; etc.

SALES PROMOTIONS (S.P.s) (See also OUTLINES 2.28 - 2.30)
- Active sales promotions include activities which differ from day-to-day business procedures
- Passive sales promotions are activities undertaken in support of sales excluding P.R. & media advertising

EXAMPLES
- Packaging changes,
- Product literature,
- Exhibitions & Trade Shows, (See OUTLINE 9.18-21)
- Direct Mail selling - (See OUTLINE 5.33)

S.P.'s are usually of limited duration with quite specific, limited objectives eg: special offers & pricing to clear stocks.

NEGATIVE ADVERTISING
- As seen in anti-smoking, anti-drugs, drink-driving advertising — stresses personal & social consequences.

CONSIDERED CONSUMER PURCHASES eg. cars or washing machines. These are not 'bought', they are sold. Advertising does not sell them. The dominant influence is the salesperson. Purchaser thinks through the purchase, assisted by adv't'g.

PAPERS :-
Sales Promotions - OUTLINE 2.28-2.30
Expo Selling - Outlines 9.25-27
Direct Mail - Outline 5.33

∝ Issue 1

Customer = End user

COMMUNICATING WITH THE MARKET 2 (2) 'OUTWARDS'

* MERCHANDISING THE ADVERTISING
* COOPERATIVE ADVERTISING
* PUBLICITY

MERCHANDISING
- Be sure your salesforce are both aware of, & enthusiastic about, what the advertising can do for them
- Get the salespersons to 'sell' the advertising to customers to understand how your company is helping to build their businesses.

Advertising can be made more effective by MERCHANDISING it to your salesforce & they then merchandise it in turn to their customers (dealers, retailers, etc.)

After sales meetings, staff leave with basic materials relating to advertising, complete media schedules & campaign details to pass on to their customers.

COOPERATIVE ADVERTISING
Manufacturer pays a stated percentage of cost of advertising placed by their customers up to a stated percentage of the value of customer purchases from the manufacturer.
- Expenditure accrues to the mutual benefit of retailer & manufacturer.
- Be sure that the funds expended provide a satisfactory return.

- Money goes towards localised advertising; classified ads; radio & TV ads.; Christmas & seasonal catalogues; etc.
- A part of the company's overall sales budget.
- Policy & conditions covering co-op advertising should be published for both your own sales organisation & your customer's benefit.

PUBLICITY Uses mass communication media to tell your product or company story. Benefits are :-
- It is FREE !
- It represents third party endorsement of the product or service (being part of the editorial content of that medium).

Downside considerations

Editors of local newspapers, TV or radio stations often have consumer features dealing with consumer goods, or special feature supplements covering
- big sales deals,
- new companies re-locating,
- new stores opening,
- local initiatives & sponsorships.

PUBLICITY RELEASES to the media should:
- focus only on the 'news' not just the company.
- be useful to an editor.
- be professionally written.
- give name, title & tel.no. of a contact
- provide black & white photograph if possible.

DOWNSIDE
Any copy submitted is subject to being re-written or revised so when, where & how it appears is beyond your control.

CUSTOMER ≠ ENDUSER

COMMUNICATING WITH THE MARKET 3 (of 3) 'INWARDS'

* FORMAL MARKET RESEARCH
* INFORMAL MARKET RESEARCH

Sales managers bear the responsibility of ensuring effective 2-way communication with customers, end users & the organisation.

FORMAL RESEARCH has an important role. The responsibility of agencies, or special departments within the company. Conceived as formal, in-depth & scientific (but also time-consuming & expensive with complicated procedures & long lead times).

- Examines figures & attitudes relating more usually to product categories.
- A company can profit from formal market research, it could fail due to lack of informal market research.

INFORMAL RESEARCH uses a simple cost effective management information gathering system :-

- by home-office staff
- by sales personnel in the field

FIELD RESEARCH

Day-to-day intelligence gathering includes :

- Customer (dis)satisfaction with competitor's products &/or services & servicing
- Competitive moves; pricing; micro-marketing; test products; line extensions; etc.

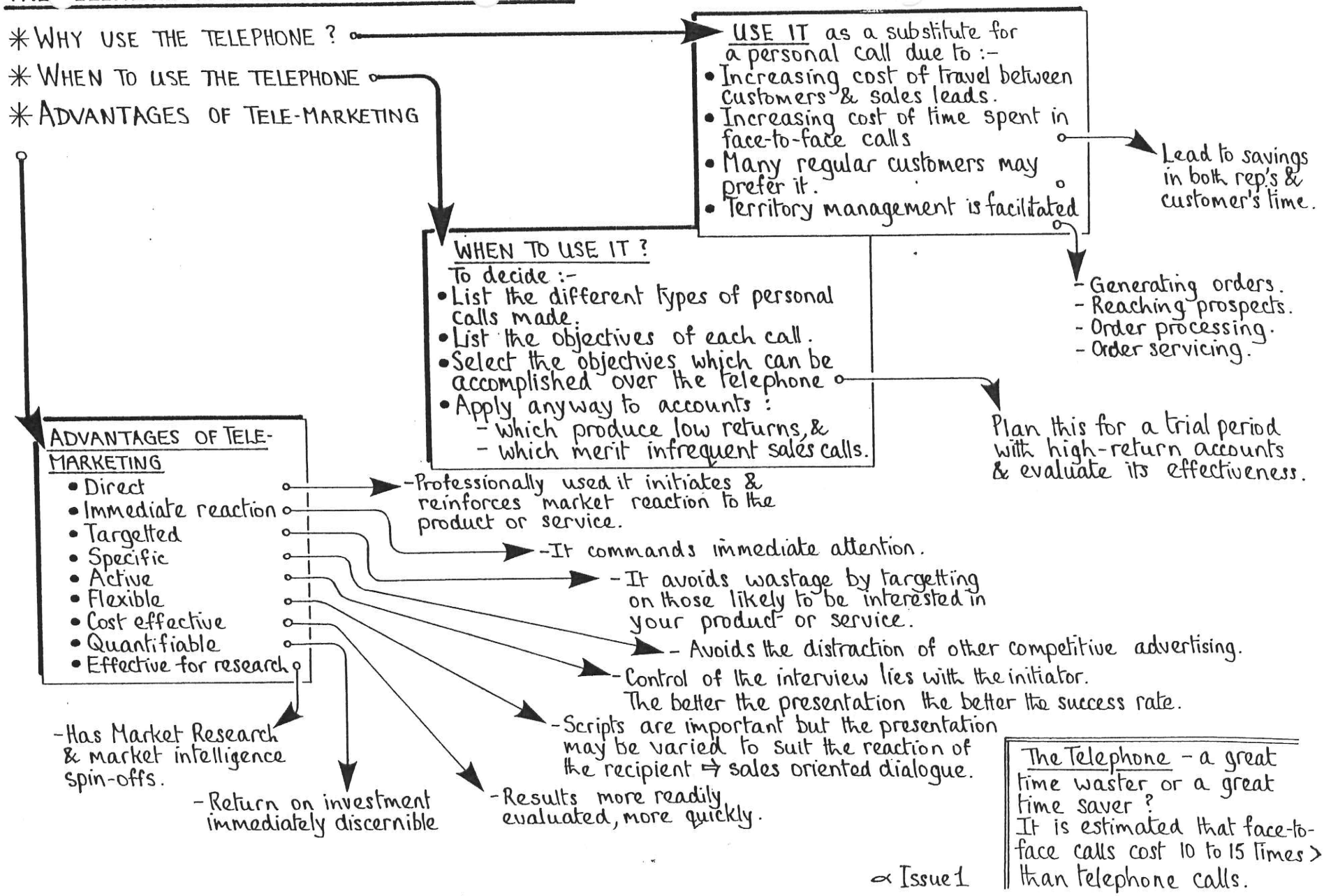
Passed to sales managers for compilation, evaluation & dissemination. Gives time to (re)frame strategies & responses before competitors can evaluate their test markets. Quick counter-moves can obscure their results.

DAY-TO-DAY RESEARCH

- Using competitor's products & company products on a regular basis for comparison based on performance & ease of use. Gives pointers to end-user satisfaction or disappointment.
- Studying competitive advertising & estimating spending levels.
- Clip & study advertising from trade magazines, weeklies & monthlies

Glean new product news & insights; launches & sales campaigns; also imminent promotional campaigns.

THE TELEPHONE IN SALES MGT & TELE-MARKETING



The Telephone - a great time waster or a great time saver ?
It is estimated that face-to-face calls cost 10 to 15 times > than telephone calls.

∝ Issue 1

WORKING THROUGH AN ADVERTISING AGENCY

* SELECTING AN AGENCY
* WORKING WITH AN AGENCY

Advertising is a significant selling cost - it must be well directed & service the selling organisation well.

SELECTING AN AGENCY

The process involves:-

- Generating a list of prospects.
- Screening them
- Short-listing to 3
- Receive presentations
- Pick an agency

GENERATE A LIST Key sources are Agency Directories & Yellow Pages. Factors to consider:

- the agency size,
- the kinds of accounts served
- their geographical location
- your budget (Will they be interested in you?)

- 'Reasonably local' reduces travel & lodging costs; telephone costs; servicing & shipping costs; speeds communications & improves control.

- Are they in the same business area as yourselves?

SCREENING - A short questionnaire will assist you to learn what you need to know & not what they want to tell you

- By personal visit, on appointment.
- By inviting a presentation.

Details to include:

- Size. - Growth over last 5 years.
- Distribution of account size.
- Accounts lost/gained in last 2 years.
- Personnel split between creative & business sides.
- Specialised services (graphics, P.R., research, etc.) - Creative philosophy.

PICKING

Key elements of choice include:

- people you will see & work with.
- costs, & what you will receive.
- experience in your market & channels of distribution.
- creative impression.
- how they will budget to spend your money & control costs

PRESENTATIONS Choose between:

- 'capability presentation', where you view work done for some other client?
- a 'speculative presentation' for your products? Might cost you some money!
- some other presentation?

SHORT-LISTING Eliminate:

- obviously unsuitable ones,
- uncreative ones,
- '..not comfortable with...' ones,
- etc.

WORKING TOGETHER

Requires:-

- Mutual trust & understanding.
- Clear cut objectives based on your company sales & advertising plan.
- Knowledge of what the advertising is meant to achieve.
- Giving them time to plan & develop the advertising.
- Confidence in their professional knowledge & skills.
- Free exchange of information

Sales by:

- product line,
- territory / regions,
- distribution channels,
- pricing strategies,
- new product information,

& potential changes in any of these subjects as they may arise.

∝ Issue 1

SELLING OVERSEAS - INTERNATIONAL SALES MANAGERS

* DIFFERENCES FROM THE HOME MARKET
* ROLE OF OVERSEAS SALES MANAGER
* EXPECTING THE UNEXPECTED

DIFFERENCES

- Extended lines of communication & lead times.
- Overseas territories are essentially heterogeneous in language & culture & require detailed knowledge of how business is done in other cultures
- You need to understand how social, political & economic conditions are inter-related
- Understand how many ways you may culturally offend a customer
- Possibly a difference of scale too.

REQUIRES :- Additional patience perseverance, understanding & recognition of the motivations that create a sale.

- Channels of distribution,
- Sales techniques, &
- Promotional & selling tools.... often resemble home conditions.

CONDITIONS

- You cannot judge their systems from your home country experiences.
- The terms 'industrialised', 'agricultural' & 'underdeveloped' when related to economies are meaningless.

OFFENDING

- Reactions to colour & symbols on packaging may differ.
- Sometimes family & business matters are totally separated.

ROLE OF O/S SALES MANAGER

- Adjust to different scale of expenses, sales volume & paperwork.
- 'Doing' groundwork' means 'legwork' around the overseas territories
- Learn language &/or customs, an interpreter would be useful.
- Reinforce relationships between self & o/s customers
- Sell the concept of o/s sales to senior management at home

- Possibly by doing some training in the home country.

EXPLORE

- What the market is.
- Where the market is.
- How to do business.
- How to maximise sales.
- What sales aids & promotions to use.
- What training to do locally. (Sales & product training)
- Profit calculations.
- Which markets to visit frequently or infrequently.

THE UNEXPECTED

- Economic climate & governments MAY change, but rules WILL.... based on valid economics or whims
- When dealing with foreign business people, they will do what serves themselves best

- Treat them as 'endusers'.
- They will welcome all the merchandising assistance you can supply.
- Training & support activities differ in operation & practice but not in principle.

- Tarriffs may prohibit imports.
- Exchange regulations may alter.
- Product specifications may discriminate against you.
- Packaging requirements may alter.

(Customer ≠ Enduser)

OVERSEAS SALES should NOT be limited to times of excess inventories, 'seconds', or recession in the home market.

∝ Issue 1

MANAGEMENT TRAINING FOR FIRST-LINE SALES MANAGERS

* WHY DO THEY NEED TRAINING ?
* MAIN FUNCTIONS NEEDING TRAINING
* SECONDARY FUNCTIONS

WHY TRAINING ?

Their role is to develop an effective sales force :-

- They usually rise from the ranks of the field salespersons.
- Good field salespersons do not automatically develop into good managers.
- First-line managers are not so much producers of sales as producers of people who produce sales.

MAIN FUNCTIONS

- Recruitment & selection of trainees
- Initial training of recruits
- Field coaching
- To run district sales meetings
- Appraisal & counselling interviews
- Troubleshooting/firefighting

RECRUITMENT etc.

2-day sessions centred on case history reviews & role plays.

- writing job descriptions & person specifications.
- sources of recruits
- analysing application forms & short-listing.
- techniques of interviewing candidates & referees.

- Handling big deals; troublesome complaints; problem solving; etc.

SECONDARY FUNCTIONS

- Implement company marketing plans, (communicating downwards).
- Collecting marketing intelligence, (communicating upwards).

And possibly,

- Assigned accounts.
- Warehousing or customer service operations

EXAMPLES

- Handling orders; complaints; customer credit & some accounting.

INTERVIEWING

- Handling performance reviews needs careful training based on setting measurable objectives not just sales volumes & number of calls but factors like.... calls : orders ; no. of demonstrations; no. of new accounts..... eliciting feedback by salespersons on the interview & new objectives.

TRAINING RECRUITS

They are trained at H.Q. usually but field training is a first-line manager's job.

FIELD TRAINING

Observes & coaches trainees & marginal performers but top performers need some attention too.

DISTRICT SALES MEETINGS

Function is to build team spirit & sharpen sales skills for district salespersons.

Learn to :

- set observable objectives for topics to be covered,
- build participation & 2-way communication,
- inject sales skills training through
  - role play,
  - team problem-solving,
  - rehearsing demonstrations
  - assigned talks.

FIELD COACHING

- Starts with understanding why this function is important to :
  - correct sloppy habits,
  - reinforce desirable behaviour,
  - lead / show by example where necessary.

MANAGING GROUPS

* THE IMPORTANCE OF RECOGNISING WORK GROUPS IN ORGANISATIONS
* GROUP SIZES & STRUCTURE
* MANAGING THE GROUP

RECOGNISING WORK GROUPS

Groups are among the most important of the intervening factors which weld an organisation. They influence people & the way work is performed.

- They influence people's perception
- They teach others about the work & the organisation.
- They control behaviour.

GROUPS can often .....

- Reduce psychological barriers to matters of communication.
- Develop special languages, words & rules for ordering communications.

GROUP SIZES & STRUCTURE

- Is the size right?
- Is there a need for sub-groups to be constituted?
- How long has the group been constituted?

- Time for norms to develop?
- Time for leaders to emerge?
- Have good working practices developed?
- Might a group morale be determined?

Compatible with features like:
- Span of control,
- Forming effective teams,
- The nature of their task/work
- The urgency of their tasks.

- Quality Circles or Problem Solving needs small groups.
- Duty allocations can be to large groups.

MANAGING THE GROUP

- Do you set group objectives & ensure everyone understands them?
- Are performance standards clear?
- Are working standards clear?
- Are you fair & impartial in enforcing them?
- Do you look for opportunities to build teamwork into jobs?
- Do you take action against matters likely to disrupt the group?
- Is there a formal & fair grievance procedure?

- Understood by all.
- Operates without undue delay.

- Time keeping; quality; safety; output; etc.
- Also the consequences of infringement
  - on the individual,
  - on the group.

- Internal & external to gp. operations.

- Building teams encourages cohesiveness.

* ENCOURAGING THE GROUP

Do you :-

- Welcome & encourage their ideas & suggestions?
- Provide regular opportunities for genuine consultation? → - Before taking decisions which affect them.
- Regularly brief the group on the org'ns current plans & future dev'ts?
- Recognise status, seniority & natural leaders within the group? → - Accord facilities (time & training) to develop their effectiveness.
- Accept trade unionism & representation as able to make positive contributions to better working → - Accord facilities (time & training) to develop their effectiveness.
- Champion the group when circumstances require it?

MEETING AN INDIVIDUAL'S NEEDS

* RELATING TO TASK
* RELATING TO THE PERSON
* RELATING TO THE GROUP

TASK RELATED

- Is their task clearly defined ?
- Are performance standards clearly laid out & agreed ?
- Have time parameters been agreed ? → - Short term ? - Long term ?
- Has responsibility been defined ?
- Has authority been delegated ?
- Have others concerned been informed ?
- Are the necessary resources available to complete the task ?
- How do you (& they) recognise successful completion of the task ?

GROUP RELATED

- Is he/she a member of a work group ?
- Are you aware of the group norms ?
- What level of rapport exists between him/her & other group members →
- Does he/she support the group ?
- Does the group support him/her ?
- Are you supporting his/her integration into the group ? →

- Do they 'fit in' ?

- (See Group Norms)
- Good rapport improves performance & reduces stress problems.

INDIVIDUAL / PERSON RELATED

- Has he/she adequate skills to perform the task ? →
  - Is training / retraining necessary ?
  - Is the task commensurate with this person's skills ?
  - Do they see some pattern of salary or career development in prospect ?
- In the event of success..... →
- In the event of failure..... →
- How can you reduce your control/ supervision & increase their responsibility ?
- How can you increase their accountability & authority ?
- Do you appraise their performance ? →
- Do you really care about this individual ?

- Annually, or more regularly ?
- What career development opportunities exist ?
- How are you helping him/her ?

- Do you recognise it ?
- Do you give constructive criticism ?
- How do you then progress ?

- Do you recognise it ?
- How do you build upon it ?
- Is capacity & pay in balance ?

PAPERS

Outline 7.28 - Group norms
" 9.38 - Managing groups

∝ Issue 1

ACHIEVING A TASK

* SETTING OBJECTIVES
* EXAMINING THE TASK
* PERFORMING THE TASK

SETTING OBJECTIVES

- Are they clearly defined ?
- Have they been agreed ? → - With yourself. - With your boss
- Are they consistent with organisational objectives?
- How long have you got ? → - Do you need a programme for reaching these objectives ?
- Have you the authority to proceed ?
- Have you the resources to proceed ?

EXAMINING THE TASK

- Is it clearly defined ? → - Have your authority and responsibilities been defined? - Have others been informed of your authority & responsibilities.
- Is this the best way forward ? → - Could you get better results some other way ?
- What conditions need prevail to complete the task ? → - Have performance standards been defined ?
- To whom are you accountable ? → - Are they the best conditions to achieve the required performance ? - How could they be improved upon ?
- Who is accountable to you ? → - Are lines of authority clear ? - 'Span of control', beware of having too many (best 10 or 12 maximum) preventing effective management of the task.
- What abilities, skills, aptitudes are required to complete the task ? → - Have you those skills, aptitudes, etc ? - Do your colleagues / subordinates have them ? - What gaps exist in them ? - What steps will you take to fill these gaps ?

PERFORMING THE TASK

- How are you / your subordinates spending your time ?
- Are your priorities right ?
- Are group & individual needs being considered / satisfied ?
- Are you giving / getting satisfactory feedback ? → - Identifying weaknesses in performance. - Identifying deviations/variances from norms or standards.
- Are you giving / getting adequate support ? → - From/to superiors. - From/to subordinates. - From/to service departments.
- Are you setting the right example to your subordinates ? → - In personal performance. - In man-management techniques.
- Do you take stock periodically ? → Are you achieving objectives? - time objectives, - cost objectives, - performance objectives, - etc.

ACTION PLANNING

* WHAT IS 'ACTION PLANNING'?
* WHY SET 'ACTION PLANS'?
* WHEN TO SET 'ACTION PLANS'
* SETTING 'ACTION PLANS'

PAPERS
A.325 Objective setting for management appraisal.
A.450 M. by Objectives

ACTION PLANNING is :-
- The setting of an objective, target or goal to be achieved.
- Usually by the manager & subordinate together

WHY SET ACTION PLANS?
- To set off an individual (or group) on an agreed course of action with specified targets / objectives.
- To enthuse or attain commitment to this course of action

FORMAT
I/we intend to do
.....
by .....(time/date)
in order to.....
.....(state objective(s))

SETTING ACTION PLANS
- Not too many at once (<8).
- Make them hard but not impossible
- Make them capable of being reviewed.
- Acknowledge constraints, if any

WHEN TO SET ACTION PLANS
- At the end of a planning/review/appraisal meeting.
- When a course of action is needed to progress a task or agree on objectives.

Action Plans should be :-
measurable quantifiable; realistic; achievable; challenging; relevant; definable; etc.

For Example
- Resourcing,
- Seasonal,
- Environmental,
- Legislative,
- Time,
- etc.

Set performance standards regarding :-
- quality,
- quantity,
- time,
- number of units,
- etc.

-To give individuals or groups more purpose & direction into which to channel their efforts.

WHY ACTION PLANS?
- To assist the organisation to :-
  - achieve objectives as effectively as possible,
  - to plan & control,
  - to communicate & appraise.
- To assist individuals to :-
  - give direction,
  - use time more effectively.

JUSTIFYING A 'ZERO DEFECT' PROGRAMME

* WHAT IS THE Z.D. PROGRAMME ?
* CAN YOU EXPECT Z.D. PERFORMANCE ?
* Z.D. PERFORMANCE
* ESTABLISHING A Z.D. PROGRAMME

Zero Defect (Z.D.) - is a personal performance standard which implies prevention as well as cure.

THE Z.D. PROGRAMME

- It begins at management level & 'grows' downwards.
- It sets performance standards that will not be misunderstood.
- It implies a change of attitude & 'culture'
- It means 'do it right, first time.'

Requires :-
- Defect prevention,
- Error-free performance.

The defect which is prevented does not need repairing, examination or explanation.

ERRORS are caused by :-
- Lack of knowledge, which can be cured.
- Lack of attention, which is a state of mind.
- Errors are not inevitable.

'VARIANCE' is a fact but can be considered in a Z.D. programme.

CAN YOU EXPECT Z.D. ?

- In individual family life we do not tolerate errors
- We do not buy appliances (say) accepting a 5% possibility it will malfunction.
- If double standards are not to exist, individuals within organisations can strive for Z.D. performance.

- In our pay cheques,
- When receiving change,
- When buying services,
- In medical care,
- etc.

Z.D. PERFORMANCE

Covers :-
- Costs
- Scheduling
- Quality

Adequate quality levels (AQL).....
- Implies a commitment to produce to imperfect standards.
- Usually based on historic data, so, operations are setting the standards of the 'status quo'.
- Z.D. requires that management sets the standards.

- Budgets can be set & adhered to. (Customers will insist on zero price variance !)
- Standard clocks & calendars mean suppliers; deliveries; completion dates can be specified.

ESTABLISHING A Z.D. PROGRAMME

- Establish management's commitment & formulate a policy
- Assemble a representative team to speak for the sections concerned
- Perform a quality audit covering current practice
- Establish the cost of current 'corrective' procedures of any nature
- Communicate your concern; policy; ideas to the sections concerned
- Recognise & commend progress towards Z.D.

- EXAMPLE :- '...to perform exactly to the requirements, or cause the requirements to be officially changed to what we & the customer need....' (P.B. CROSBY 1979)
- To commit the section to action → Includes design; accounting, production, computing, marketing, etc. not just the obvious persons.
- To action that commitment
- Establish performance standards where none exist.
- Record standards to see where improvement / corrective action is possible.
- Costs of rejects; waste; reworking; servicing; repairing; inspection; loss of market share; etc.
- Get them acting positively & thinking quality & error-reduction.

PAPERS :-
Outlines 1.41-1.49 'Performance Mgt.'
3.11 'The Persuit of Quality'
3.12 3.13 'Quality Audits 1 & 2'
4.40 'Quality Control'

IDENTIFYING QUALITY MANAGERS 1 (of 2)

✳ CHARACTERISTICS OF QUALITY MANAGERS (Sequence is not significant)

- Has a knowledge of finance
- Knows the problems of production (or services)
- Understands salesmanship
- Has an awareness, enthusiasm & commitment to Quality
- Demonstrates man-management skills
- Exhibits personal skills (Sheet 2)
- Innovative & confident
- Builds respect

→ - Leading to effective cost management in all fields.

→ - Appreciates the need to drive for sales.
"Job security is the natural successor to customer satisfaction."
- Recognises all managers as part-time sales managers.

→ - In Board & office support services.
- In marketing & selling.
- In production & servicing.
- In seeking a better quality of life for employees.

→ - For others.
- From others to self.

INNOVATIVE & CONFIDENT

- Looks for new opportunities for the benefit of the organisation.
- Believes all changes are challenges.
- Demonstrates abilities in problem-solving & decision-making.
- Is never surprised (or shocked) if in control of events.

DEVELOPING AN AWARENESS OF QUALITY MAINTENANCE

- Good quality is 'exact fitness for the intended purpose.'
- If the specification is poor the quality is poor. (Yet it may still be 'fit for purpose'.)
- Make it easy to understand what is meant by maintaining quality.
- Discover exactly what the customer/user needs
- Specify standards & don't permit deviation from them.
- Give priority to maintaining quality standards.
'QUALITY STANDARDS ARE NEVER NEGOTIABLE'
- Encourage pride in achievement & competitiveness.

MAN-MANAGEMENT SKILLS

- Leadership (Situational approach)
- Motivation.
- Time planning.
- Training & coaching.
- Counselling & appraisals.
- Communication.
- etc.

IDENTIFYING QUALITY MANAGERS 2 (of 2)

* CHARACTERISTICS (from page 1)

* RECRUITING MANAGERS OF QUALITY

Objective:- to appoint & retain managers of quality.

STAGE 1
- write job specification; person specification; compose advert asking for c.v.; talk with prospective interviewees on the telephone when they reply

STAGE 2
- Interview

STAGE 3
- Take references

Preliminary question & answer session comprises the first assessment.

REFERENCES
- Only telephone references are 'reliable'.
- Make them after the interview and the interviewee has indicated a wish to join you if the post is offered.
  - interviewee must inform previous employer.
  - offer is made subject to references being taken.

INTERVIEW
(See other Outlines)
- Can we work with him/her?
  - observe & make visual judgements, listen carefully.
- Is the c.v. accurate/valid?
- Does he/she fit specifications?
- What have we to offer that is so good?

- Exhibits personal skills
  - Communicates well, without an excess of paper-work.
  - Supports the organisation's policies & objectives.
  - Demonstrates loyalty to organisation, work unit & colleagues.
  - Reacts to criticism by believing it might be fair.
  - Limited reliance on organisational structures & bureaucracy.
- Leads by example.
- Manages stress in self & others
  - Stress from:-
    - worrying when a task is beyond you.
    - fear of failure, or the unknown.
    - overloading (of 'willing horses')
    - being a victim of prejudice.
    - lack of rapport with colleagues.

    (See Outlines on 'Stress')
- Manages conflict
  - To reduce incidence of conflict considers:-
    - own actions,
    - other's reactions,
    - potential for conflict in any situation.
  - Tackles conflict early before attitudes harden to something more serious.
  - Manages conflict between parties.
    - Discusses disagreements with (A) & (B) separately.
    - Identifies common ground & isolates points of difference.
    - Seeks compromise WIN:WIN situation.
- Manages change
  - Involves participants in planning & consultation before implementation.
  - Listens to amendments & seeks advice. (Why didn't it work last time?)
  - Carries out minor suggestions on a trial & error basis. (Not too expensive anyway.)

BUILDING EFFECTIVE TEAMS

* WHAT IS A TEAM ?
* CHARACTERISTICS OF AN EFFECTIVE TEAM
* BENEFITS OF TEAM-BUILDING
* DISADVANTAGES OF TEAMS
* REQUIREMENTS OF TEAM MEMBERS

WHAT IS A TEAM ?

- A collection of individuals assembled for a specific purpose.
- Energised by their ability to work together.
- Committed to high level outputs.
- Concerned about group processes & each other.

SEEKING SYNERGY

- Where the strength (effectiveness) of the whole is greater than the sum of its individual parts.

CHARACTERISTICS OF A EFFECTIVE TEAM

Team members :-

- Skilled in communicating, giving & receiving feedback.
- Knowledgeable of & practiced in group maintenance processes.
- Supportive of the leadership, however transient.
- Committed to the implementation of team objectives & decisions.
- Sharing of power & authority.

The team :-

- A strong commitment to achieving tasks.
- Concerned about its own growth & maturity.
- Sees conflict as healthy & necessary in a climate of trust, openness & understanding.
- Decision-making by concensus.

BENEFITS OF TEAM BUILDING

- Better understanding of the situation & problem definition.
- Greater commitment to TASK.
- Greater productivity.
- Flexibility in a changing environment.
- Increased individual growth opportunities.
- Developing openness & trust between team members.

DISADVANTAGES OF TEAMS

- Time consuming - do you need teams for everything ? (See Outlines 2.08; 2.09)
- Loss of individual's identity.
- May become a vehicle for criticism of the organisation.
- Not always better decision-making than might be made by experts.

REQUIREMENTS OF TEAM MEMBERS

- Relevant expertise in the problem areas.
- Full & willing participation.
- Commitment to team objectives.
- Understanding of group dynamics

'Gatekeeping' - increasing the involvement of others in the group - must be routine to all members.

PAPERS
Team building Outlines
2.06-2.09

TEAMBUILDING EFFECTIVELY

* RESPONSIBILITIES WITHIN THE TEAM
* CREATING A TEAM WHICH WILL GROW

RESPONSIBILITIES

Who is responsible to :-

- Steer the team → - Providing objectives & giving direction.
- Provide the ideas → - From inside & outside the team.
- Promote the team → - To the organisation, pay master or client.
- Get things done → - Converts ideas to tasks?
  - Decides how to do the tasks?
  - Schedules, co-ordinates & controls the work?
  - Actually does the work?
- Maintain harmony within the group → - Group maintenance is everyone's concern & responsibility but often one person stands out in this role.

CREATE A TEAM WHICH WILL GROW

- Get a balanced team → **BALANCE** is found by:
  - Using individual abilities,
  - Bringing in new abilities,
  - Developing latent abilities, &
  - Identifying individual & group strengths & shortcomings
  - Defining the task clearly & the resources available.
- Generate energy → **GENERATE ENERGY**
  - Involve all the team & create enthusiasm for the concept.
  - Improve communication.
  - Share responsibilities & gain commitment.
  - Aim to create loyalty & confidence will increase with success.
- Provide common objectives → **COMMON OBJECTIVES**
  Create a common purpose from combining individual, group & task objectives.
- Get ideas → **GET IDEAS**
  By common processes & by listening to each other more closely.
- Convert ideas to tasks → **IDEAS TO TASKS**
  Constructively criticise ideas & identify creative solutions to problems.
- Present the right image → **THE RIGHT IMAGE**
  - Understand what is wanted.
  - 'Sell' the team & educate those on whom the team rely
- Meet individual needs → **MEET INDIVIDUAL NEEDS**
  Although part of a team, there are still needs for:
  - Growth & self development,
  - Challenge & freedom of action,
  - Greater involvement & personal advancement.
- Create the right environment → **THE RIGHT ENVIRONMENT**
  Creativity is encouraged within the team through increased environment of:
  - security,
  - flexibility,
  - openness.
- Provide coordination → **PROVIDE CO-ORDINATION**
  - Know what is wanted.
  - Know what is going on.
  - Learn how to delegate effectively.
- Generate trust → **GENERATE TRUST** -
  within & between groups by
  - recognising individual abilities,
  - encouraging symbiosis,
  - encouraging social contracts,
  - generating 'esprit de corps'.

MORE THOUGHTS ON TEAMBUILDING

- ✳ WHY HAVE A TEAM ?
- ✳ BELONGING TO TWO TEAMS
- ✳ WHAT MAKES A TEAM WORK
- ✳ WHAT PREVENTS A TEAM FROM WORKING

WHY TEAMS ?

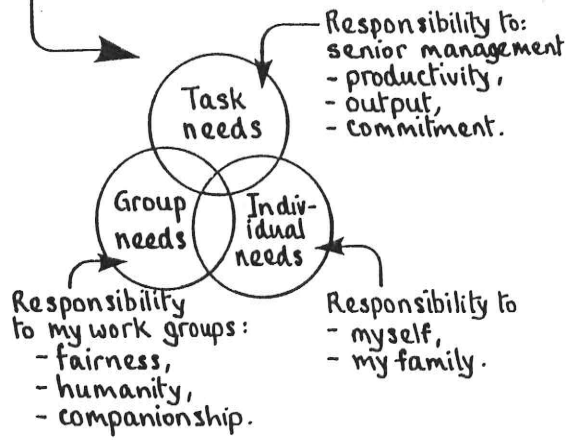
- To persue joint objectives :
  - solving problems,
  - giving companionship,
  - giving security.
- To give mutual assistance :
  - by filling different roles,
  - providing different abilities.

BELONGING TO TWO TEAMS

- Most people will belong to more than one team
- May result in a clash of objectives between teams

Many 'groups' are often teams in some senses, eg.

- me, and my family,
- my colleages & senior management,
- my peers.



WHAT MAKES A TEAM WORK ?

- A wish to solve a problem :
  - an outside threat,
  - grasping an opportunity.
- Mutual respect for each other:
  - openness,
  - time for each other,
  - interpersonal skills & listening.
- A need for each other :
  - using their different abilities,
  - filling different team roles.

WHAT PREVENTS THE TEAM WORKING ?

- Lack of trust :
  - no time for each other,
  - conflicting objectives,
  - lack of harmony,
  - unfairness.
- Lack of objectives :
  - lack of direction,
  - lack of scheduling & control,
  - lack of problem solving ideas.

S.T.P. MODEL OF PROBLEM ANALYSIS

* WHAT IS THE S.T.P. ANALYSIS?
* PROBLEM DEFINITION & SOLUTION
* S.T.P MODEL

S.T.P. ANALYSIS is a way of organising information & ideas:- for defining :-

- Problems & solutions (suited to use by problem solving groups)
- To resolve or manage the conflict that occurs in creating a solution. (by Formire & Walfen)

PAPER A.655 - S.T.P. Problem Analysis ISSUE 1

DEFINITION & SOLUTION

- We recognise a PROBLEM exists when we experience negative feelings concerning a discrepancy between the current state of X & what we perceive as a more desirable state of X.
- DEFINITION requires 3 sets of information to be made explicit
- SOLUTION. Action which group members can support which will move the current state of X into the desired alternative.

- What are the essential features of the current state?
- What are the key attributes of the desired alternative state.
- What forces facilitate or impede our moving from the current to the alternative state.

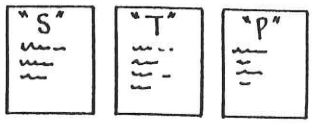
S.T.P. MODEL has 3 inter-related dimensions :-

- S - Situation - Starting point. The environment as the group perceives it.
- T - Target - Termination The outcome desired by the group.
- P - Plan/Proposal - Path from S. to T. The groups behaviour

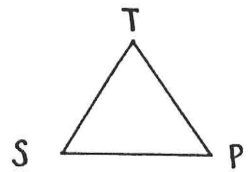
Facts; opinions; explanations about current conditions; predictions about efforts to change.

Goals; aims; ends; values; purposes.

Means; plans; strategies; implementation procedures.



* INTERDEPENDENCE OF S-T-P



- To work in one dimension at a time is ineffective, it can stifle creativity & decrease involvement.
- Any proposal may reveal new targets(T) or information about S.
- Comments about S or T may result in information in another dimension.

RECYCLING

- Group discusses the problem freely, contributing information about S, T, & P as it occurs.
- Record the information on flipchart paper headed 'S', 'T' & 'P'

OBJECTIVES

1. Create a description of the current situation which can be understood & accepted by different group members.
2. Create a set of T's which satisfy 2 criteria :-
   'To accomplish what?'
   'How will we know when the goal has been achieved?'
3. Create a plan of action specifying who does what & when. Move from generalisations to specific plans of action.

PROBLEM SOLVING USING FORCE FIELD ANALYSIS (F.F.A.)

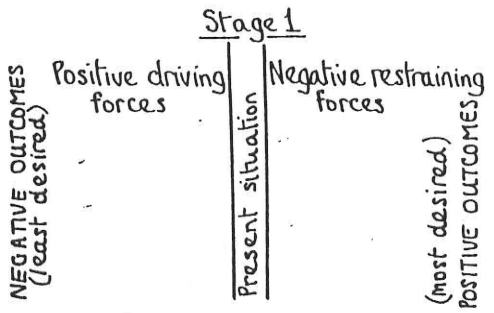
* DRAWING A FORCE FIELD DIAGRAM
* ADDING THE 'FORCES'
* ALTERING THE EQUILIBRIUM
* EXAMINING THE 'FORCES'

PROBLEM - TO MOVE FROM THE PRESENT SITUATION TO A MORE DESIRED SITUATION.

STEPS IN DRAWING IT OUT

- Identify the present situation (or behaviour) as it exists.
- Identify positive end-point or most desired situation.
- Identify the negative end-point or least desired situation (or behaviour).
- Assemble the information in the Force Field Diagram 1

Stage 1



ADDING THE FORCES

Analyse the situation to identify :-

- All the forces (factors) working towards the most desired outcome → - Factors may be social; psychological; physical; real or imagined; etc.
- All the forces working against achieving the most desired outcome → - Which, if unrestrained, would result in achieving the least desired outcome.
- Write/draw in the forces on the FORCE FIELD diagram. (Stage 2)
- Add any neutral forces which may be present → - Forces which, though not active now, may affect the equilibrium in the future if they could be exploited

Commonly, where a problem exists, the 'negatives' outnumber 'positives'.

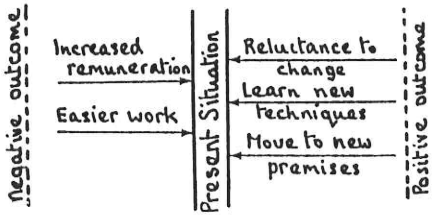
Factors we may consider 'imaginary' may appear 'real' to dis-satisfied parties.

- You might plan to activate potential positive forces in future.

ALTERING THE EQUILIBRIUM

- INCREASE the positive 'driving' forces.
- DECREASE / REMOVE the negative restraining forces.
- Apply both the above actions → - Since to strengthen a force often results in strengthening the resistance to it, a better plan is to weaken restraining forces.

Stage 2 (EXAMPLE)



EXAMINING THE FORCES

Taking the forces individually,

- State clearly what it is & its effect.
- Is it a social, psychological, physical or other force ?
- In importance, rate it strong, weak or medium.
- How easily could it be changed ? (Easy; mod. difficult; difficult) → Consider factors like :
  - time to alter them,
  - cost of altering them,
  - permanence of the actions, etc.
- Focus on negative forces which are easy to alter → - What can we do to reduce or remove them ?
- Focus on positive driving forces → - What can we do to strengthen them ?

DEVELOP ACTION PLANS, IMPLEMENT & EVALUATE THEM.

F.F.A. is particulary useful in problems involving human behaviour on the assumption that factors exist within the person & the environment which affect behaviour & can be altered.

∝ Issue 1

ENTREPRENEURISM

* ENTREPRENEURISM v ADMINISTRATION
* ENTREPRENEURIAL FLAIR
* RISK TAKING
* NEED FOR ADMINISTRATION

E'ISM v ADMIN'N

Sometimes seen as the difference between being :-

- EFFECTIVE - doing the right things,
- EFFICIENT - doing things right or in the best possible way.

In competitive business the entrepreneur has to be effective to survive. Long-term success needs an efficient administration to support the business planners

- Modern business-lore sees entrepreneurs as daring venturers bored by administrative attention to detail.
- Administrators - seen as boring unimaginative bureaucrats.
- These are extreme stereotypes & generally a-typical.

What is an ENTREPRENEUR?

Colloquially 'an enterprising & innovative business person' or 'an imaginative opportunity-seeking executive, prepared to take calculated risks with the resources of his/her enterprise to maximise its profits.'

E'IAL FLAIR

Is recognised as the combination of key management abilities :-

- To see situations objectively
- To show decisiveness & inspired leadership
- The capacity to work hard & effectively.
- To be creative & imaginative
- To accept the risk factor.
- To be a skilled negotiator.
- To be keenly aware of the external environment in which the company exists & must operate.

Inside & outside the organisation.

Sees opportunities & problems from a number of points of view. Identifies more courses of action.

RISK TAKING

The capacity & willingness to take risks is a key attribute :-

- To exploit opportunities profitably
- To vary the risk-taking according to the prevailing circumstances
- To build-in contingency plans.
- To deal with the known resources at their disposal.

Success breeds confidence, failures undermine it. Success feeds on success & failure compounds failure

Successful entrepreneurs identify & weigh all known factors in a situation & evaluate probabilities relating to unknown factors.

NEED FOR ADMINISTRATION

Some 'hi-tech' industries in the 1980's showed great entrepreneurial talent but were subsequently 'taken over' to sustain their work & growth. They lacked a satisfactory administrative base.

Entrepreneurs need to be :-

- Systematic planners
- Good delegators of administrative matters
- Aware that in their very strengths are their commonest weaknesses.

Probably happier dealing with broad strategies than with tactics.

Recognising the need to resource proper procedures & employ persons better qualified to manage them.

ENTREPRENEURIAL TYPES show no tendency to being all extroverts or introverts. Both types exist. Extroverts have higher profiles but most successful business persons are stable introverts.

ISSUE 1

PAPER :- A.768

Contents

PART 1 PERSONNEL SKILLS

Career Counselling	10.01
Career Planning	10.02
Redundancy 1	10.03
Redundancy 2	10.04
Redundancy & Redeployment	10.05
The Helping Relationship	10.06
Understanding Job Advertisements	10.07

PART 2 SERVICE INDUSTRY MANAGEMENT

Aspects of Selling a Service	10.08
New Technology in Service Industries	10.09
Innovation & Growth in Service Industries	10.10
Reproducing Service Industries	10.11
Pricing a Service	10.12
Image Management in Service Organisations	10.13
Quality Considerations in Service Industries	10.14

PART 3 MARKETING & SALES MANAGEMENT

Differences between Sales & Marketing Roles	10.15
Establishing the Sales Organisation 1 - Structuring the sales force	10.16
2 - Alternative Structures	10.17
3 - Making the Organisation Work	10.18
Improving the Performance of Average Salespersons	10.19
Sales Forecasting	10.20
Sales Auditing	10.21
Developing a Sales Campaign 1	10.22
Developing a Sales Campaign 2	10.23
Managing Sales Effectiveness	10.24
Sales Effectiveness & Productivity	10.25
Characteristics of an Effective Sales Manager	10.26
The Successful Sales Manager	10.27
The Industrial Market 1	10.28
The Industrial Market 2	10.29
Selling to the Industrial Market	10.30

PART 4 TRAINING MANAGEMENT

Designing Training within Organisations	10.31
Reviewing the Organisation's Training Resource Needs	10.32
Reducing Training Costs	10.33
Developing Senior Managers	10.34
Duties of a Course Director	10.35
Encouraging Learning 1	10.36
Encouraging Learning 2	10.37

PART 5 MISCELLANEOUS

The 3 Roles of a Consultant	10.38
Reward Systems & Needs Satisfaction in Organisations	10.39
Interpersonal Skills Training	10.40
Managing your Boss	10.41

PART 6 COMMUNICATION SKILLS

Mounting a Display	10.42
Using an Overhead Projector	10.43
Using Training Outlines (& Handouts)	10.44
Writing Outline Papers (Summaries)	10.45
Communications within Organisations	10.46
Communication & Co-ordination within Organisations	10.47
Factors Hindering Effective Communications	10.48
Defensive Communication	10.49
Interpersonal Skills - Confronting & Supporting	10.50

PART 7 INDEX

Keyword Index	pp 51/52

CAREER COUNSELLING

* WHAT IS CAREER COUNSELLING ?
* THE ORGANISATION'S PERSPECTIVE
* APPROACH TO COUNSELLING
* HOW TO PROCEED

CAREER COUNSELLING involves discussion between employee & boss (or specialist) covering:-
- What the subordinate wants to do in the future.
- What the manager thinks the subordinate should do, &
- How to equip the subordinate for this planned future.

It does NOT assume:
- a job/role will be provided.
- that everyone merits promotion
- a career path can be guaranteed.

COMPANY PERSPECTIVE

This is part of a company's social support system:-
- It considers future manpower requirements
- It recognises the need to develop employees
- It plans & assists this development as best suits the company & the employee.

Employees may have skills & interests which are presently underused or under-developed but their development could benefit both the employee & the company.
- A satisfied worker is a better employee.
- The employee is better motivated.

THE APPROACH
- Who should counsel this employee?
- The preparation
- The invitation to make a written submission

WHO ?
- Is there someone who specialises in career counselling ?
- Can you deal with the interview ?
  - is your interviewing technique satisfactory ?
  - can you be suitably impartial & objective ?
  - can you say 'NO' if necessary ?
- Can you knowledgably discuss alternative career paths ?

- Invite a submission of outline ideas for you to prepare yourself & explore possibilities before the interview.

HOW TO PROCEED
- Normal interview procedures apply.
- Encourage subordinate to talk freely of what they want to do & why.
- Be open, honest & sympathetic but do not build false hopes.
- Build a development plan together & get commitment to it

- Include arrangements for training, etc.
- Others can help but the individual has the ultimate responsibility for his/her own development & growth.

PREPARATION
- Separate career considerations from current performance appraisal & counselling.
- Focus on the future of the employee. Do they seek advancement or change of path. (Sideways move.)
- Is subordinate promotion material?

In this case current performance is a factor to consider.
- What positions are available...
  - now, or
  - in the future.

CAREER PLANNING

* PREDOMINANT FACTORS
* CAREER TRANSITIONS
* WHY THE NEED FOR CAREER PLANNING ?
* REQUIREMENTS FOR CAREER PROGRAMMING
* PERSONAL AUDITS

PREDOMINANT FACTORS in career development are :-
- Personal ambition
- Organisational needs

(S.W.O.T.= Strengths; Weaknesses; Opportunities & Threats)

PERSONAL AMBITION
- Junior personnel are considering personal needs & developing technical competence.
- Senior personnel are governed more by organisational needs & developing managerial competence.

- If no change in organisation is anticipated.

CAREER TRANSITIONS
Major changes produce periods of vulnerability & stress. They include:-
- Changing organisations
- Major promotions
- Redundancy
- Retirement
- Job stagnation or impoverishment

WHY CAREER PLANNING?
- To prepare for career transitions.
- To set personal horizons.
- To identify role conflict & identity strains
- To become pro-active rather than re-active in career matters.
- To confront unfamiliar issues.

TYPICAL REACTIONS
- What is expected of me?
- How should I behave?
- Will I cope?
- Who can help or guide me?

OTHER TRANSITIONS through the sequence:
- Apprentice / Colleague / Mentor / Sponsor (Dalton. 1977)

REQUIREMENTS FOR CAREER PROGRAMMING
- Information about self; job; career; hopes; ambitions. → (See PERSONAL AUDIT)
- Support
- Job-related opportunity info".

- Conflict & strain lead to a reduction in personal effectiveness.
- Identity strain eg. when you are demoted, made redundant or 'over-taken' by younger persons in your mid-career.

- How & when new knowledge & skills will be needed.
- Chance to develop managerial skills.
- Experience leadership role & the exercise of authority.
- Become aware of your own behaviour & its impact on others.

SUPPORT
- To test out ideas & perceptions.
- To compare self with other people's experiences
- To get valid, objective opinions.

- Males have a wide range of 'models' for comparison, example or parallels.
- Currently, women have fewer exemplary 'models' for comparison, etc.

PERSONAL AUDITS
Start with a S.W.O.T. analysis then consider :-
- What do I want of my career?
- What don't I want?
- What do I enjoy & do well?
- Where do I want to be?
- What do I need to be more effective?
- Where do I find help, guidance & support?

Activities which fulfil & motivate you personally & professionally.

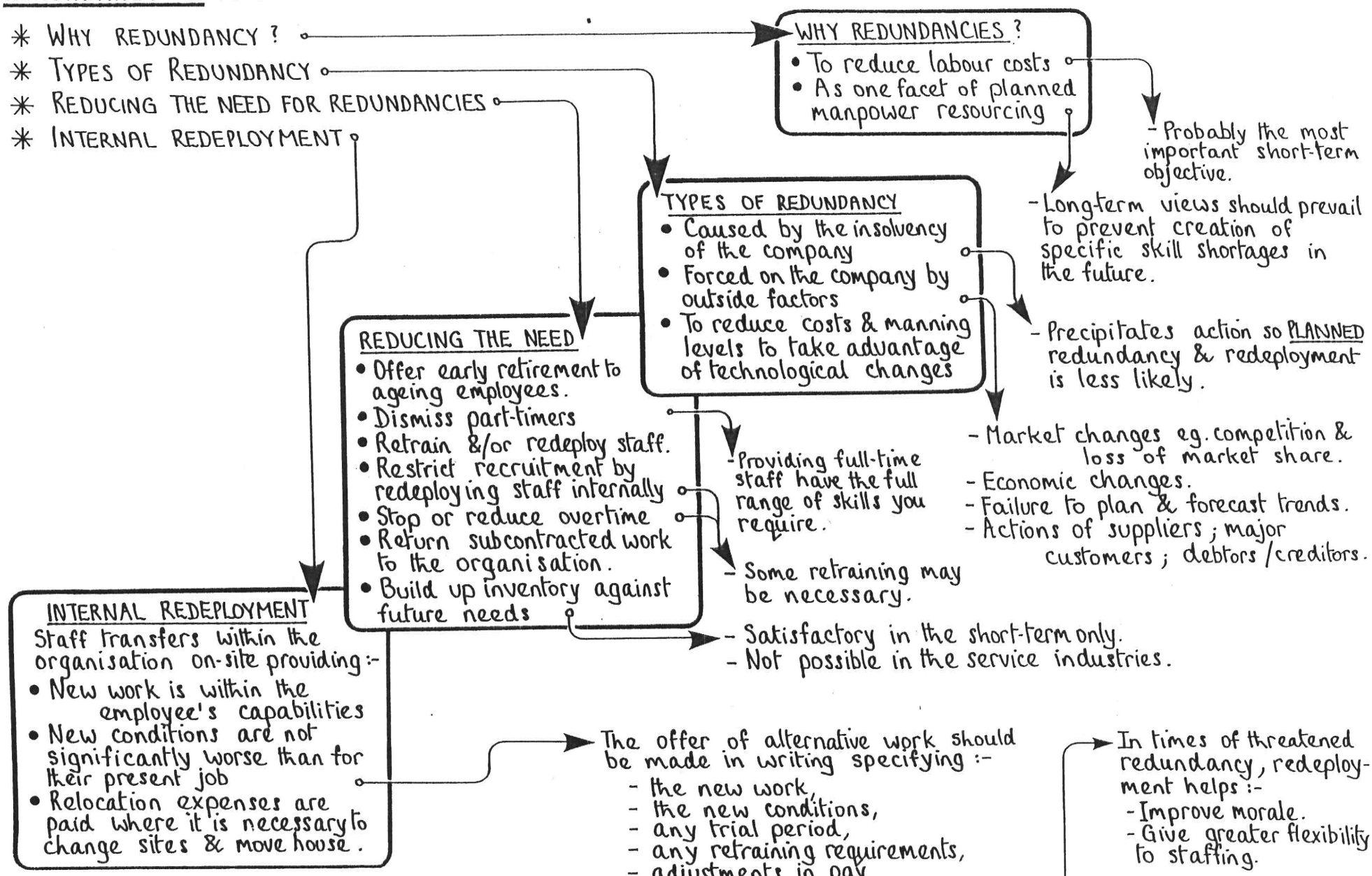
HORIZONS
Short-term, 2/3yrs
Mid-term, 5/8yrs

∝ ISSUE 1

10.02

REDUNDANCY 1 (of 2)

- ✳ WHY REDUNDANCY ?
- ✳ TYPES OF REDUNDANCY
- ✳ REDUCING THE NEED FOR REDUNDANCIES
- ✳ INTERNAL REDEPLOYMENT



REDUNDANCY 2 (of 2)

- ✳ VOLUNTARY REDUNDANCY
- ✳ WHO SHOULD GO ?
- ✳ L.I.F.O. (LAST IN, FIRST OUT)
- ✳ CONSULTATION
- ✳ REDUNDANCY NOTICES TO EMPLOYEES

VOLUNTARY REDUNDANCY

Covers :-
- Those eligible for early retirement
- Others who want to leave

– Candidature for VOLUNTARY REDUNDANCY is usually dependent upon:
- the type/size of compensation offered,
- the co-operation of staff & unions to maintain good relations,
- the selection procedure for choosing candidates.

CARE ! To avoid :-
- leaving the organisation short of critical skills,
- a serious age imbalance to cause problems later,
- undue pressure on staff eligible for - but not seeking - redundancy.

WHO SHOULD GO ?

- Selection methods must be clarified & procedures agreed beforehand, following consultation.
- Guard against discrimination on the grounds of race; sex; age; union membership; etc.

Factors which may be grounds for an appeal to an Industrial Tribunal.

L.I.F.O.

Favoured by many because :-
- Easy to operate.
- Easy to understand.
- People know where they stand.

Also :-
- Compensation is geared to length of service.
- Cheaper for the organisation

DISADVANTAGES OF L.I.F.O.
- Possible uneven distribution between departments and grades could result in shortage of workers in certain key posts.
- Leaves ageing staff to cause future problems.
- Redundant employees may never build up confidence, experience, etc.

CONSULTATION

- Management must decide on the need for, & the scale of, redundancies.
- Unions (or staff representatives) of affected employees must be told early

- To allow suitable representation.
- To submit alternative proposals.
- To negotiate severance compensation.

NEED TO KNOW
- The reasons for the redundancies.
- Number & types of job to go.
- The selection techniques.
- The method & timing of the dismissals.

REDUNDANCY NOTICE

- U.K. legislation specifies minimum periods according to length of service.
- When planned, longer notice can be given

(Full-time employees are usually entitled to reasonable time off with pay to attend job interviews or arrange training for a new job.)

It may assist job seekers but could cause skill shortages as your best people take the available jobs first.

REDUNDANCY & REDEPLOYMENT

* ✳ Use of career counselling
* ✳ Seeking training / retraining
* ✳ Finding alternative employment

USE OF CAREER COUNSELLING

Sensitive counselling could establish specific requirements :-

- to help employees clarify their future <u>needs</u>
- of what assistance is needed to find <u>alternative employment</u>
- Concerning <u>financial arrangements</u>

<u>NEEDS</u> Counsel to reduce fear and :

- To see redundancy as an opportunity.
- To determine exactly what they want to do.
- To assist people to solve their own problems.
- To help them find their feet again.
- To set personal objectives & action plans to satisfy their needs.

<u>ALTERNATIVE EMPLOYMENT</u> Counsel to :

- identify skills they have acquired to widen their choice of job opportunity.
- increase self-confidence & market these skills (see OUTLINE 5.23).
- plan an approach to systemmatic job hunting.
- possibly deter them from looking <u>ONLY</u> for jobs like the one they are losing.

<u>FINANCIAL ARRANGEMENTS</u> Counsel or advise:

- How to invest financial compensation to supplement a pension.
- How to use it to start a business.
- How to buy a pension entitlement.
- How to get grants for further training.

SEEKING TRAINING

They may seek training courses :-

- to upgrade or update existing skills,
- to add complementary skills,
- to acquire new skills/knowledge,
- to improve their personal assets & marketability.

They will need information concerning :

- What courses are available,
- Where the courses are held,
- Course entry qualifications (if any),
- Type of course to enrol upon (full-time, part-time, evening, etc.),
- What grants & expenses are available,
- Potential for re-employment with the new qualifications,
- What happens if courses are not completed (for any reason).

FINDING EMPLOYMENT

- Job search can be implemented/ supplemented by setting up 'Job Shop' facilities on the current employers premises
  - Involves P.R. element in highlighting an image of a caring company.
  - Improves company morale of remaining employees.
  - Should do better than the individual employees unaided.
- Use specialist recruitment agencies. (Often used in cases of major redundancy programmes.)
  - May provide job-market researchers ; office services; interview coaching ; self-marketing advice ; professional vocational counselling ; etc.

PAPER
Outline 5.28 Self Marketing

10.05

THE HELPING RELATIONSHIP

- ✳ WHY HELP PEOPLE ?
- ✳ REACTION OF THE RECIPIENT
- ✳ WHEN HELP IS ACCEPTED
- ✳ WHEN HELP IS REJECTED
- ✳ THE IDEAL SITUATION

Helping is a central social process of the service professionals. Everyone likes to feel they are helpful, no one will admit to being purposely unhelpful.

WHY HELP PEOPLE ?

Motivations may include :-

- To improve performance of a subordinate.
- Makes someone happy
- Its my job
- Induce indebtedness

'Now you owe me!'

- Gives meaning to my life.
- Gets me gratuitous comments.
- Gives me satisfaction.
- Demonstrates my superior skills & knowledge.

IDEALLY

In organisations, jobs are better done if :-

- Helper & recipient grow & develop,
- There are joint objectives,
- There is communication & mutual trust.

REACTIONS OF RECIPIENT

- Gratitude & thankfulness
- Admiration for, or jealous of the helper.
- Resentment.
- Increased feelings of helplessness & dependency

- Possibly becomes more creative, more motivated, less dependent on the helpers.
- Now less able to take decisions or initiate own actions.
- Unable to take risks, less creative & venturesome.

WHEN TO HELP

Where perceived motives are congenial, help is accepted.

- Reciprocal feelings of :- -trust, -acceptance, -warmth, -openness,
- Leaves the recipient with full autonomy.
- Both giver & receiver may grow

They quest together on the common task, experimenting, with a shared potential for learning.

HELP IS REJECTED when :-

- Perceived motives are not congenial
- It is seen as a condemnation
- It is perceived as part of being appraised or a defect to be remedied.
- There is limited growth opportunity

- Makes others dependent.
- Trying to change them by modelling or coaching
- The process is uni-directional.
- A form of punishment, indoctrination, a strategy or training.

- Pupil never better than the coach or teacher.
- Worker never better than the supervisor.
- 'Learner' conforms to the 'superior's' image.

10.06

UNDERSTANDING JOB ADVERTISEMENTS

(Perfecting you Job Finding strategy)

* IS THERE A GENUINE JOB VACANCY ?
* UNDERSTANDING THE ADVERTISEMENT
* WHAT NEXT ?

IS THE VACANCY GENUINE ?

- Is it a large ad?
- Is it a recruitment agency ad?
- YES, but some public sector organisations advertise as a matter of course

The larger the ad. the more likely it is to genuine - think of the expense.

-Some person may already be earmarked for the job.
-Internal applicants may have a head start.

This is a costly undertaking for an organisation so they are expecting an external candidate.

UNDERSTANDING THE AD.

- Are senior positions really open to external candidates
- Outside consultants/agencies have more objective. views of posts
- Is the vacancy advertised by the companies themselves
- Is it a re-advert ?

Is the organisation/field of activity expanding ?
- probably YES, extra staff are needed to assist development.

Zero-growth organisations or contracting fields of activity ?
- internal candidates will lessen your chances.

The Job Description will be factual & reliable to attract suitable applicants.

Scrutinise past company reports & other literature to determine :
- are they financially viable ?
- what is their management style?
- are they in growth, recession or standing still ?
- what opportunities exist for personal growth & development ?

It could have resurfaced for a variety of reasons :
- Appointee turned it down.
- The company is testing the market & there really is no vacancy.
- The company has difficulty recruiting & retaining staff
- There is a genuine shortage of staff in that particular area.
- Someone has erred.
- Terms of reference altered.
- First set of applicants were of the wrong calibre.

·They may be bad employers offering poor pay & working conditions.

WHAT NEXT ?

- Apply for the post to test the company & evaluate the opposition you face.
- If you applied before, follow up re-adverts & say you are still interested.

- If you don't apply you never get considered.
- You never know what will turn up so get your 'foot in the door' for the future.
- From a very high calibre field of applicants they may find room for two candidates.
- The lucky candidate leaves a vacancy in his/her old company. Use initiative & follow it up.

ASPECTS OF SELLING A SERVICE

- ✳ BECOMING A CUSTOMER
- ✳ SELLING THE SERVICE
- ✳ KEEPING THE CUSTOMER
- ✳ ASPECTS OF SERVICE MANAGEMENT
- ✳ ASPECTS OF CUSTOMER MANAGEMENT

BECOMING A CUSTOMER

- Services are less tangible than (say) automobiles or drinks where you can see the product & evaluate it before buying.
- Many services cannot be experienced until AFTER the decision to buy it.

SELLING THE SERVICE

Due to its intangibility :-

- More reason to have brochures; testimonials from satisfied customers; etc.
- Customers are also very interested in the service delivery system.
- Customers equate equipment; premises; financial resources; etc. with the expected quality of the service
- Contact personnel are important to carry the company 'image', re-assuring & demonstrating the service's value & benefits

- Empathic & creative diagnosis of customer/client's problems will create confidence in the service & promise value to come.

- Banks & financial organisations always feature these.

KEEPING THE CUSTOMER

- Good initial service creates a 'pool' of goodwill in the customer.
- Repeat sales are easy
- Changing suppliers (of the service) requires investment by the customer.
- Pool of goodwill often disguises the need to strengthen relationships with customer

- Express complaints are a poor indicator of client satisfaction or dis-satisfaction.

- Pool of goodwill can be a buffer (long-term) & does not reflect a fall-off in the service quality

- Less time & money need be invested in repeat sales than in finding new business.

SERVICE MANAGEMENT

- Services do not always translate easily between different market segments.
- Where the service involves some knowledge transfer to the client, the level of client knowledge will affect the quality of the service offered.
- Pricing can become an active & purposeful management tool to regulate the client-company relationship.

CUSTOMER MANAGEMENT

- Can the timing of these service demands be regulated ?
- Can customers choose between levels of service?

- Smoothes operational demands on staff, equipment & resources.
- To accommodate their ability to afford the service.

10.08

∝ ISSUE 1

NEW TECHNOLOGY IN SERVICE INDUSTRIES

* PROBLEMS WITH NEW TECHNOLOGY
* WHY INTRODUCE NEW TECHNOLOGY
* OTHER ADVANTAGES OF N.T.

PROBLEMS

- Automated services which eliminate personal interaction may have unexpected social consequences
- Status of professional groups may be threatened or swept away

Used skillfully, it can enhance & promote social processes within effective service organisations.

WHY INTRODUCE N.T.? (or physical aids)

- Cost rationalisation
- For quality control
- Better quality service
- Closer links with the customer
- Physical aids may facilitate or create interactions which affect client's social behaviour.

For company staff & client.

OTHER ADVANTAGES

The equipment used by a service company may serve to :-

- Position it in the human resource market.
- Enhance the status & motivation of employees.
- Add something to the service company's image.

COST RATIONALISATION

- Machinery as a substitute for manpower may :-
  - reduce costs,
  - increase efficiency.
- May permit re-design of the delivery system eg. automated cash dispensers.

QUALITY CONTROL

- Replacing the human element can lead to easier control & standardising the quality of service.
- Standard physical layouts of premises ensure consistency of staff behaviour eg franchise restaurants & the need to 'do it right, first time & every time'.

PHYSICAL AIDS

Could be a tool; a machine; or a building.

NEW TECHNOLOGY

More commonly associated with electronic apparatus of sorts but not exclusively, e.g. automatic car wash.

PHYSICAL AIDS .....

... may be as simple as the words on a menu which stimulates personal interactions with restaurant staff.

CLOSER CUSTOMER LINKS

- Linking client's information systems with the service supplier improves client relationships which are then more difficult to dissolve eg. supermarkets with computerised checkout tills linked to banks, etc.
- Service organisations can later sell peripheral services on the strength of the above.

QUALITY SERVICE

- Possibly 24-hr. service now available supplying more data, more services, more speedily, eg. cash dispensers, rapid sample testing in laboratories.

INNOVATION & GROWTH IN SERVICE INDUSTRIES

* INNOVATION & GROWTH
* TYPES OF INNOVATION
* SOCIAL INNOVATIONS
* INTERNAL DRIVES FOR INNOVATION

INNOVATION & GROWTH

- Where a particular service industry flourishes - growth & reproduction of the service offer specific difficulties.
- INNOVATION is more concerned with the service delivery system.
- DIVERSIFICATION is concerned with broadening the range of services provided

Needs to be handled with great sensitivity as differing services appeal to different market segments. Their service delivery & service management systems may not coalesce. Customers are also confused.

TYPES OF INNOVATION

- TECHNICAL innovations produce a demand for faster, slicker related services
- SOCIAL innovations give individuals greater freedoms which throw up new & different social needs

EXAMPLES :- Weight Watchers; crime prevention; franchising; leisure industries.

EXAMPLES :- Food technology; Credit card selling.

SOCIAL INNOVATIONS

Creating new types of social behaviours :-

- Client participation
- Creating new roles or new role sets
- Discovering underutilised human energies
- Scale advantages

EXAMPLES :- D.I.Y. Tool hire; Training Consultants; etc. where client takes over the process of the service following tuition.

EXAMPLES :- Leisure industries, bringing together new social groupings.

EXAMPLES :- Self management of the service by the clients - Weight watchers; etc.

- Franchising can spread a service country wide (or internationally) once effective reproduction formulae have been utilised eg. hotel & airline booking networks; fast food operations; etc.

INTERNAL DRIVES FOR INNOVATION

- New values, life styles & associated problems
- Need for increased efficiency & R.O.I.
- Staleness & lack of innovation by established organisations

- Leisure industries.

-Hives off uneconomic activities to sub-contractors eg. canteen; security; cleaning services.

-language colleges arose from inadequate school language teaching.

- Peripheral health care org^{ns} from inadequacies in social medical services.

PAPER :- Outline 'Reproducing Service Industries'.

REPRODUCING SERVICE INDUSTRIES

* GROWTH IN MANUFACTURING INDUSTRY
* GROWTH IN SERVICE INDUSTRIES
* REPRODUCING THE SERVICE MANAGEMENT SYSTEM
* MAKING SUCCESSFUL REPRODUCTIONS

MANUFACTURING

This industry grows by :-
- Increasing manufacturing capacity.
- Adding selling outlets.
- Extending product range.
- Packaging & shipping goods further.
- Increasing line & staff personnel.

Senior management need not alter much in numbers or mode of operation.

A Service business system comprises :-
- a service concept,
- a service delivery system,
- a market segment,
- an image,
- a culture and management system.

GROWTH IN SERVICE INDUSTRY is dependent upon the social actions of the clients who have to be motivated in some way.

Grows by :-
- Adding more services.
- Expanding the territories.
- Reproducing the service management systems

- Where the service is of a professional or creative nature, finding personnel is difficult.
- Can grow from a single centre but only slowly.
- Easier where the service can reproduce through a franchise system.

TO REPRODUCE THE SERVICE MANAGEMENT SYSTEM
- Analyse it down to the few key characteristics necessary for it to function.
- Conceptualise ways to formulate & control the key success factors.
- Acquire management & support systems which make reproduction feasible.

FOR SUCCESSFUL REPRODUCTIONS
- Describe the service, service levels & quality standards to be achieved.
- Maintain central control of essential components of the service & delivery system.
- Identify & communicate central success formulae
- Develop information & reporting systems to support the service mgt. system & direct attention to them.
- Support central location of expertise
- Establish formal contracts
- Develop desirable career structures

EXAMPLES
- Image ; recruitment ; layout of premises ; etc.
- For back-up problem-solving & consultation.

CONTRACTS .... designed to control behaviour & actions of 'cloned' service organisations.

The service management system which operates the original unit may not be right to support the reproduction process with its particular needs & characteristics.

PRICING A SERVICE

- ✳ PROBLEMS OF PRICING
- ✳ PRICING CONSIDERATIONS
- ✳ TYPICAL PRICING STRATEGIES

The intangible nature of the service makes it difficult to give detailed specifications of the service & account for its cost. For a unique service which clients value highly, what will they afford?

PROBLEMS OF PRICING

- Few services are identical or standardised to allow comparison.
- Pricing is arbitrary when the cost of production ≠ the value to the customer.
- Marginal costs have little direct connection with average total cost.
- Many service industries have considerable front-end investment.

PRICING CONSIDERATIONS

- How do the company's costs arise?
- How will price influence customer behaviour?

→ Prices must reflect the decision-making process of the client & yet hope to use the company's key resources to their maximum eg.
- Rewarding off-peak travellers with cheaper fares.
- Leasing or purchasing of capital equipment.
- etc.

PRICING STRATEGIES

Usually depend on specifying most precisely the elements of the service package & finding the value of each element to the customer.

- Price each element & invite clients to assemble their own packages → Useful in that customers segment the market for you.
- Main component of the service carries all the cost → Customer negotiates for 'value-adders', i.e. desirable extras to satisfy specific needs.
- Success-fee pricing → Links price to results achieved & gives client more control & reduces their uncertainty.
- Incentive pricing → INCENTIVE PRICING links pricing to client performance eg. profit sharing or motorists' NO-CLAIM BONUS on insurance policies.
- Loss leaders → Launch a new service at a low price with the intention to raise prices when better established.
- Offset pricing → OFFSET PRICING: Low cost for basic service but prices desirable peripheral services much higher.
- Price lining → Keep a constant price but vary the service quality to whatever the client will accept.

IMAGE MANAGEMENT IN SERVICE ORGANISATIONS

* THE IMPORTANCE OF IMAGE
* WHAT MAKES THE IMAGE?
* USING THE IMAGE

The company IMAGE is a model signifying our beliefs & understanding of the organisation.

IMPORTANCE OF IMAGE

'Image' has become a mgt. tool because :-

- If not 'real', it is a 'social reality.'
- It has a tendency to reinforce itself.
- Once established, it becomes self-fulfilling.
- It generates purposeful behaviour to reinforce image.
- It influences others' perception of the organisation & so has a snowball effect.

WHAT MAKES THE IMAGE?

The IMAGE in the minds of staff, clients & environment is determined by :-

- The nature of the service itself.
- The organisation's culture & members (staff).
- Its location in the market.
- Company activities to strengthen or clarify an image

→ - False images frequently decay with a resulting backlash among staff.

USING THE IMAGE

- For the customer to identify with
- For staff to identify with
- To assist recruitment
- To influence other resource holders

→ - Demonstrates resources & concrete achievements.
- As a guarantee of good service.
- As a member of the select 'user' club.

→ - Internal marketing to staff shapes their behaviour, motivation, loyalty & attitude to the customers.
- Used to increase productivity, or prior to launch of new types of service eg. when bank counter staff were required to 'sell' new as well as traditional services.

→ - Suppliers are proud to be associated with.....
- A seal of approval for their products.
- The company can negotiate better deals on quality, price & delivery.

→ RECRUITMENT
- Produces better quality recruits eager to be associated with the image.
- Positions the company in the employment market.

QUALITY CONSIDERATIONS IN SERVICE INDUSTRIES

- ✳ WHAT IS INFERRED ?
- ✳ PLANNING FOR QUALITY SERVICE
- ✳ DESIGNING IN QUALITY
- ✳ ADVANTAGES OF IMPROVING QUALITY

WHAT IS INFERRED ?

The term 'QUALITY' must apply to :-

- The Product
- The Process
- The Production or delivery system
- Hard & Soft features of the service package, &
- to the general policy of the organisation.

- A real & necessary focus of attention.
- A desirable inclination.

Features of a Service package

Soft features : intangibles of the service delivery system & operator's interpersonal interactions.

Hard features : those which have a direct impact upon the customer eg. does the machine work ?

PLANNING FOR QUALITY

- Create empathy with the client
- Improve interactions in micro-situations
- Use client feedback to motivate line & staff personnel
- Manage the client to anticipate & contribute to a quality experience
- Instil in service personnel the need to display a positive attitude to quality in the presence of the client.

- In face-to-face interactions, think that the client & not the company pays your salary.
- How do problems affect the client?
- Systems, tools & physical aids can be used to reinforce & enrich client interactions.
- This enhances the client's satisfaction & the service person's motivation.

DESIGNING IN QUALITY

- Senior management must show commitment to the quality concept & communicate it to all personnel
- 'QUALITY' must pervade the thinking of back-up staff & the service management system.
- Bought-in supplies & equipment must conform to quality requirements.
- 'QUALITY' must feature as a part of the company image.
- Personnel recruitment & training should stress the achievement of - and commitment to - giving a quality service.

- Helped if good examples are set by senior management personnel.

FEEDBACK

- Complements & reinforces efforts to maintain quality in in-house activities.

- Improves face-to-face interactions.

ADVANTAGES OF IMPROVING QUALITY

- Satisfied & loyal clients.
- Lower client turnover & more repeat business.
- Lower personnel turnover.
- Improved image & reputation.
- Better position in the market.

PAPERS :-

Outline 9.42 'Justifying a Zero Defect Programme'

∝ Issue 1

DIFFERENCES BETWEEN SALES & MARKETING ROLES

R.O.I. - Return on Investment.

* ROLE OF THE SALESPERSON
* ROLE OF THE MARKETING MANAGER
* BASIC DIFFERENCES

SALESPERSON'S ROLE

- Modern concept sees one's 'territory' as a business
- Key resource is TIME
- Key activity is the sales interview
- Planning activities

BUSINESS CONCEPT

- Has specific inputs & outputs.
- Seeks R.O.I. in measurable terms on territory costs.
- Productivity is crucial as costs of personal selling escalates, faster than advertising costs.

PLANNING

- Very specific, aimed at individuals or small groups
- Passes upwards sales figures & marketing intelligence.

TIME

- Sales persons working on their own decide where to invest their time.
- This limits sales calls & Return on Time invested.

INTERVIEW ACTIVITIES

- Appraises customer/prospects based on past experience of customers.
- Develops strategy for influencing prospects using a range of tools
  - Price discount variations,
  - Special terms,
  - Service arrangements,
  - Samples; demo.'s; free trials & promotions, etc.
- Transmits the company selling message by personal & printed media.
- Evaluates effectiveness of own efforts.
  - Through sales figures, prospect responses & attitudes during the selling interview.
- Adjusts strategy & tactics to new impressions & new objectives.

MARKETING ROLE

- Appraises market segments based on past experience plus market research.
- Develops strategy for influencing customers or market segments to buy the product/services & devises tools to do so.
- Transmits the selling message by all communication media at his/her disposal.
- Evaluates effectiveness of efforts in terms of market share, etc.
- Analyses & adjusts strategy & tactics & establishes new objectives.
- Seeks R.O.I. & cost management.

- May change the message & mode of transmission.
- Received more from customer services than from salespersons.

BASIC DIFFERENCES

- Quality, & amount of specific info^n gained from each customer.
- Sales person conducts sales interview & presentation.
- Marketing person groups customers into segments.

ESTABLISHING THE SALES ORGANISATION 1 (of 3)

STRUCTURING THE SALES FORCE

* UNDERSTANDING THE MARKET PLACE
* THE COMPETITION CLIMATE
* THE SKILLS OF THE SALESPERSON
* TYPES OF OUTLET/SALESPERSON

THE MARKET PLACE
- The sales force is the bridge between the manufacturer or service organisation & end consumer in one or more specialised segments of the complex marketing & distribution structures.

Def: The 'Sales Organisation' is the integrated structure of people in functions or activities who report to a line (or field) sales manager. [Does not include:- marketing oriented staff in planning, marketing, advertising product management, etc.]

THE CLIMATE
- Given similar products & promotional support, the organisation must match its competitors in call frequency; sales training; etc. enough to maintain its market share.
- If penetrating other markets or distribution channels, the sales effort need be intensified.

OUTLETS

Most companies use more than one type to adjust to the needs of specific product lines distribution channels & customer segmentation.
- Direct general-line salespersons
- Direct specialised salespersons
- National account salespersons
- Manufacturer's reps.
- Distributor's sales forces
- Dealer sales forces

(See 'Selling to the Industrial Market')

SALESPERSON'S SKILLS This will vary according to type of outlet & mission. Basic skills include:-
- Product & technical knowledge → Customer services; delivery times; etc.
- Effective & appropriate selling skills → Aggressiveness in the field versus advertising & promotional factors
- Knowledge of distribution channels.
- Specialised industry knowledge.
- Territory management.
- Merchandising skills → For point-of-sale displays & ingenuity of sales generation.
- Margins & profitability for each product line
- Necessity for accurate record keeping & returns → Also familiarity with the company objectives, strategies & planning for various product lines.

To satisfy company requirements, but also pertaining to field intelligence on competitor activities.

Direct General-Line Salespersons
- May not have specialised knowledge of customer industries, market channels or product lines & may need specialist back-up.
- Give broad, direct, account coverage.
- More controllable, but means a long-term job commitment.

National Account Salespersons are needed to sell big-volume 'house accounts' depending in part on whether national or private brands are offered.
- Highly paid, need special company knowledge, merchandising skills & price negotiating abilities.

Direct Specialised Salespersons
- Knowledgable in product lines, planning merchandising, technical troubleshooting & support.
- Best for selling specialised, high-margin technical products.
- Need large territories due to probable lower customer density.

Sales organisation is dynamic. It needs to grow as the organ'n grows, as technology changes, as competition varies & even management's capability to manage changes
Seeking the 'best fit'

Issue 1 ∝

ESTABLISHING THE SALES ORGANISATION 2 (of 3)

ALTERNATIVE STRUCTURES

* SELECTING THE BEST STRUCTURE
* GUIDANCE & SUPPORT
* SAMPLE STRUCTURES

SELECTING A STRUCTURE

The most appropriate structure must relate to :-

- the organisation's marketing strategy,
- the type & role of the salesforce,
- the market niche
- economic considerations.

GUIDANCE & SUPPORT

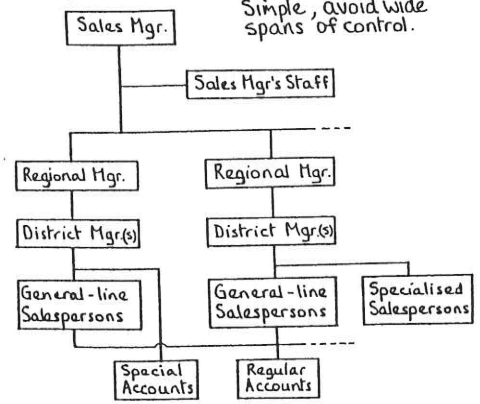
- Information, support, guidance & control are best provided through a minimum of organisational layers
- Supervision is more effective if managers have few subordinates reporting directly
- This will reduce overload caused by paperwork & deskbound activities.
- Similar considerations should apply to customer support services

- Where margins are high, products are complex/specialised, or selling tasks are complex, keep the span of control small/short.
- Usually HQ will have a larger staff to support field sales efforts.

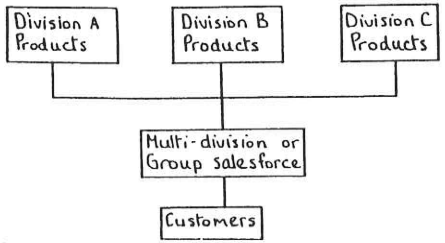
- Ideally about 6-9 persons per district manager. Similar considerations (spans) should apply higher in the organisation.
- Leaves time for planning, rapid decision-making, 2-way communications & field visits where necessary.

Straight line & staff organisation

Simple, avoid wide spans of control.

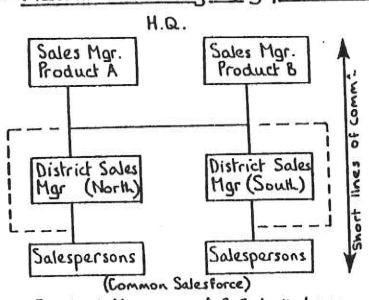


Multidivisional sales force organisation



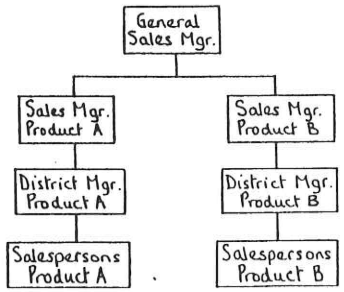
Reduces sales expenses per product line, intensifies coverage.

Matrix sales mgt. (by product lines)



Product Managers A & B both have line authority over District Managers. Individual products get more attention this way

Product specialisation organisation



ESTABLISHING THE SALES ORGANISATION 3 (of 3)

MAKING THE ORGANISATION WORK

* ✳ GOOD COMMUNICATIONS
* ✳ RECRUITMENT & TRAINING
* ✳ STAFFING & MANPOWER APPRAISALS

A proper structure & the right sales force go toward making a successful organisation but policies & procedures matter too.

GOOD COMMUNICATIONS take account of both formal & informal communication methods. They must also be fast and effective through not too many organisational layers

- Meetings; reports; memo's; telephoning etc.
- Matrix management shortens communication lines.
- Keep small spans of control.

RECRUITMENT & TRAINING

- Use personnel appraisal to identify performance & skill deficiencies at all organisational levels
- Low/average performance deserves special attention
- Pay attention to approved operating procedures too

JOB DESCRIPTIONS (JDs)

- All jobs within the organ^n. should carry detailed J.Ds showing responsibilities, authority & reporting relationships, etc.
- JDs should coordinate the work of H.Q. staff, field personnel, production, etc.
- Changes will occur & JDs should be reviewed annually for up-dating.

STAFFING & APPRAISALS

- All parts of the organisation should be adequately staffed by trained personnel.
- Spans of control should be reasonable.
- Bottlenecks in communications, decision-making, sales support services, etc. should be identified & corrected
  - · by extra staffing
  - · by extra training.
- Managers should avoid overloading which reduces time for planning, analysis & control activities.

But not if it brings too many personnel into decision-making which reduces flexibility & speed of response.

OPERATING POLICIES & PROCEDURES

A common acceptable set of procedures should be established to cope with:
- day-to-day,
- special, and
- anticipated circumstances.

It should guide but not be too restrictive to permit some allowance for individual circumstances - covering:
- authority within the organisation;
- how & when to seek support;
- pricing, credit & shipping arrangements;
- dealing with customers;
- reporting & record keeping;
- etc.

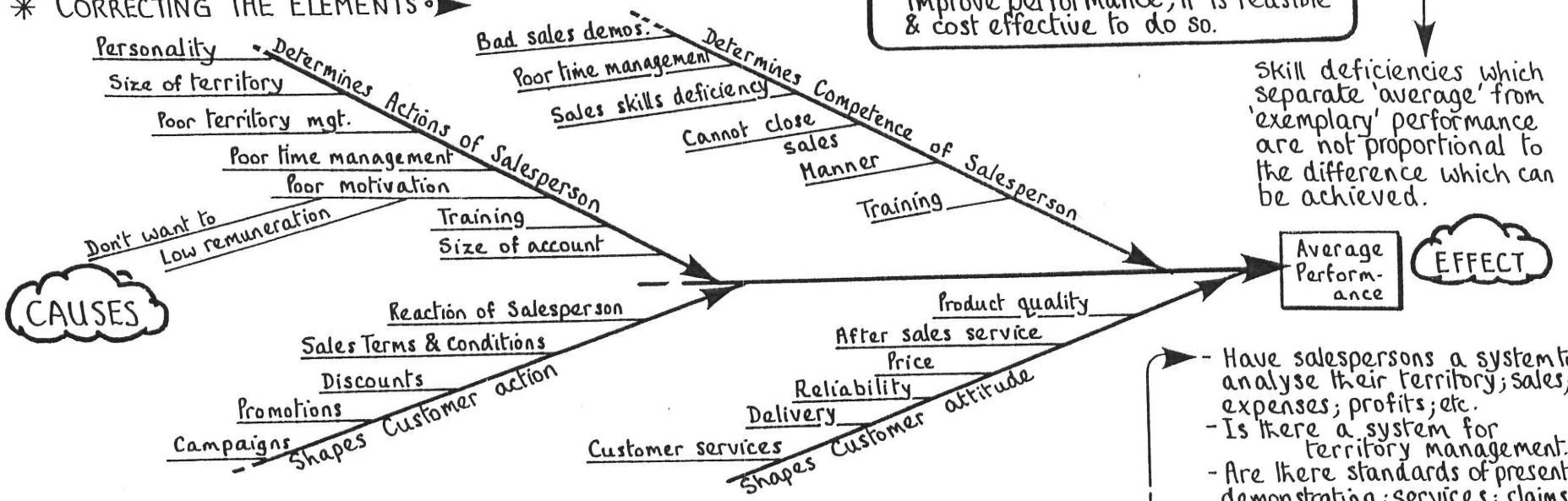
(See 'Improving salesperson's performance' Outline 10.19)

IMPROVING THE PERFORMANCE OF 'AVERAGE' SALESPERSONS

* WHY CONCENTRATE ON AVERAGE PERFORMERS?
* CAUSE & EFFECT DIAGRAM
* MANAGEMENT'S PROBLEM ELEMENTS
* CORRECTING THE ELEMENTS

WHY?
- There are more average performers than high- or low-performers.
- Marginal improvements in technique can produce bigger results
- Where there is OPPORTUNITY to improve performance, it is feasible & cost effective to do so.

Skill deficiencies which separate 'average' from 'exemplary' performance are not proportional to the difference which can be achieved.



MANAGEMENT'S PROBLEM ELEMENTS
- Have you employed the right sort of person?
- Are you too 'results oriented'?
- Is there adequate lead time between training & seeing results?
- Do you focus on salespersons' 'hearts & heads'?
- Do they know they're only average?
- Have you communicated your misgivings to the salespersons?
- Are you sure you've removed 'causes' which salespersons cannot influence?

Is there really a problem? Is it fixable & worth fixing? Could it be tolerated?

EXAMPLES
Too large a territory; inadequate training; inferior products; poor remuneration; prices uncompetitive; admin. duties excessive; etc.

CORRECTING THE ELEMENTS
- Develop improved hiring specifications for salespersonnel.
- Stay with proven selling principles
- Besides quantitative feedback, give qualitative feedback.
- Identify & correct skill deficiencies
- Are motivational factors adequate

Are they observed in the field? Do you get customer feedback? Do you appraise them regularly?

-What do you/we expect? What prevents you doing better? Could you, if you had to? Do you want to?

- Have salespersons a system to analyse their territory; sales; expenses; profits; etc.
- Is there a system for territory management.
- Are there standards of presenting demonstrating; services; claims?
- If you know & the company knows, do the sales persons know too?

SALES FORECASTING

* WHY FORECAST SALES?
* FORECASTING WHAT ?
* FACTORS INFLUENCING FORECASTS

WHY FORECAST SALES ?
- As a basis for setting production schedules in manufacturing.
- To determine timing & purchase of raw materials & parts.
- To make decisions on finance, borrowing & cash-flow considerations.
- As a basis for short-term business & marketing plans.
- To determine sales assignments for the sales personnel.

WHO IS INVOLVED?
- Marketing manager.
- Sales manager & servicing.
- Production managers.
- Financial managers.
- Purchasing & stores managers.
- Personnel manager.

FACTORS
- Controllable
- Uncontrollable

FORECASTING WHAT?
- General economic conditions.
- Buyer behaviour.
- Potential product sales.

UNCONTROLLABLE
- Economic changes influencing inflation; recession; interest rates; unemployment; etc.
- Government action influencing consumer legislation; investment; incentives; import-export controls; etc.
- Competitors' behaviour - pricing; new products; market shares; etc.
- Technological & social changes influencing buying habits; needs; innovations; resource availability; etc.

CONTROLLABLE internal factors like:
- Budgets.
- Personnel changes & training
- Product policy; changes in style; size; packaging; etc.
- Product lines; new products; deletions; etc.
- Distribution channels; new markets; etc.
- Promotions & campaigns planned.
- Advertising.

* FORECASTING SEQUENCE

Analagous to problem-solving methods :-
- Choose a method.
- Collect data.
- Analyse data.
- Add assumptions from internal & external factors.
- Make a forecast.
- Review the forecast & revise it

CHOOSING A METHOD
Considerations are :
- Is it usable based on past experience?
- Is it reliable ?
- Is everyone confident in it?

In the light of :
- Accuracy.
- Changing circumstances.

* FORECASTING METHODS

- Sales force composite
- Survey buyer intention
- Jury of executive opinion
- Variations on jury method

Valuable, close to the market.
- Each salesperson makes a forecast.
- Sales managers collate & amend forecasts.
- Passed upwards to senior management.

Interview sample of top 20% accounts to probe their intentions.

Add Market Research info if available. May ignore practicalities of implementation if 'on-the-ground' opinions are not included.

- Factor listing,
- Delphi method,
- etc.

SALES AUDITING

* WHY AN AUDIT ?
* WHO SHOULD DO IT ?
* HOW TO DO IT

WHY AN AUDIT ?
- Auditing enhances management's control function.
- Compares results with objectives & identifies variances so control action may be taken.
- Audits are not inquisitions but opportunities to improve selling performance
- Ramifications can spread to quality control, advertising & customer services.
- A well designed audit can be widely representative.

HOW TO DO IT
- Select the audit topics & decide the depth & scope of the study to narrow & precise limits.
- Write clear guides covering purpose, objectivity, time, funds & personnel required
- Decide how the information will be collected & used
- Decide the probable uses of the final report.

- What forms will be needed & their subsequent purpose.
- Use Gantt or PERT chart systems to ensure timeliness & completion of the audit activities.
- Focus on the most valuable information topics

EXAMPLES
- Is the sales force large enough?
- How accurate are sales forecasts?
- Does the sales department contribute to product planning?
- etc.

WHO SHOULD DO IT ?
- In-company auditors
- External auditors

(Large organisations will have professionally staffed audit departments.)

- Recognise problems & opportunities.
- Consider performance levels of sales &/or individual product lines.
- Impartial managers from general management or finance but NOT usually sales management personnel.
- For extensive audits employ professionals.
- For first-time audits to learn how its done
  - First-time auditors need to be aware of the procedure & the attitudes & challenges they will encounter. Also be
  - Be sensitive to levels of traffic between the team & non-audit personnel.

* THE FINAL PRESENTATION

- Should consider internal & external influences on selling performance, especially for the period reviewed.
- Some digression may be necessary from the original audit statement & guidelines
- Care should ensure the terms of the topic statement are satisfied.
- Comparisons need be made with original data models to identify variances.
- Recommendations for corrective action should be included.
- Develop standards & indexes acceptable for on-going sales performance evaluation

- Unauthorised digressions or excessive expansion should be prevented.
- Errors of forecasting should be considered & corrected.
- All sales department functions may be subject to review & appraisal.

Definition :- A means for controlling & planning selling strategies & activities through an objective & impartial analysis of actual selling activities & comparing the analysis with models of what the organisation expected.

8 Issue 1

DEVELOPING A SALES CAMPAIGN 1 (of 2)

* RESEARCHING THE MARKET
* PRE-TESTING & TIMING

The SALES CAMPAIGN is the culmination of the entire marketing plan & must relate to the org^ns strategic, marketing & long-range business plans.

RESEARCHING THE MARKET

- Define the data needed from the market information system.
- Survey, using field personnel
- Create & analyse sales objectives
- Develop a balance sheet by type of distributor

Usefully done by questionnaires (- easy to complete) & analyse answers by computer.

A balance sheet of what you are doing right / wrong identifies :
- WHO to sell to,
- WHERE in the market, and decide
- HOW they may react to to a sales campaign.

Should include :
- best-buy pricing,
- excellent servicing, &
- merchandising,

linked to superior product quality. Gear it to help the customer 'sell through' & not stock already crowded shelves.

(Customer ≠ End-user.)

PRE-TEST (&/or micro-marketing) on sub sections of a market

- Use key customers or special accounts.
- Use key sales personnel.
- Use focus groups of end-users in conjunction with market research.

TIMING

To decide if they can support a sales campaign.

- Can production service it ?
- Can 'Sales' sell it while maintaining momentum on other products / services ?
- Is the timing right in relation to internal and external conditions?
- Can we afford it ?

Consider immediate delivery & future orders.

What will be the impact on expenses & cash-flow?

* MARKET PLANS

Market planning manager now :-
- Develops & defines goals.
- Determines ways to evaluate success / failure.
- Sets budgets.
- Schedules countdown to launch.
- Establishes time limits for the campaign.

DEVELOPING A SALES CAMPAIGN 2 (of 2)

* THE SALES TRAINING MEETING
* THE SALES 'PACKAGE'
* MONITORING THE CAMPAIGN

SALES TRAINING

Structure the meeting around a well-planned sales call.

- Identify customer needs & see the sales campaign elements as a solution to the needs.
- Set specific call objectives relevant to the sales campaign.
- Arouse customer interest with effective 'openers'
- Tell the story in terms of 'customer benefits'.
- Anticipate & overcome customer objections
- Close getting commitment to relevant call objectives.

- 'How' 'where' & 'when' will vary for each sales person but the 'what' is carefully programmed.
- Use problem-solving & role plays for practical applications.

THE SALES PACKAGE

Sales staff need briefing on:-

- Product samples - to stress U.S.P.'s
- Audio-visual aids
- Literature, pricelists & orderforms.
- Accurate delivery information.
- Competitor comparisons to diffuse customer objections
- Display materials
- Customer sales training
- Advertising & P.R. materials as they will support the customer.

- What 'hook' or extra incentive is on offer other than the hope of extra profits ?
- What happens when the incentive is withdrawn ?
- U.S.P.'s differentiate your product from the competition.
- The promotion ends NOT with an order BUT with re-orders.
- Especially factory designed & installed displays.
- A-V aids, to review technical aspects of the product, tailored to the customer's requirements.

MONITORING

- Get sales returns every 2 weeks to measure against forecasts.
- Look for :
  - ripple effect on other products of the company
  - ongoing customer commitment & not just 1-off orders

- Sell the concept, not products.
- Satisfied customers mean an expanded salesforce at no extra cost.

MANAGING SALES EFFECTIVENESS

* FIELD DATA COLLECTION
* 3 KEY RATIOS
* SIGNIFICANCE OF RATIOS

FIELD DATA COLLECTION

Based on daily or weekly files of :-
- Call reports,
- Written orders,
- Expense reports,
- Itineraries, etc.

from field sales personnel

- Sales line management uses computing facilities to calculate sales control ratios.
- No two sales forces will use the same lists or ratios depending on what they are selling.
- Where distributors or representatives are involved, their's are the main sales management problems.

3 Basic RATIOS

- Calls / day
- Sales / call
- Costs / call

- Travel ; phone ; entertainment ; samples ; postage ; accommodation ; etc. (Management will want to reduce this ratio.)

Effective calls are limited, if too many calls they become less productive

Consider :-
- value of the item in £'s or $.
- number of units sold. (Management would want to see these ratios raised.)

Subject to :-
- Complexity of the sale,
- Type of call (eg. house-to-house c.f. advertising & following up replies.)
- Type of product sold. (eg. brushes v. heavy plant)

SIGNIFICANCE

- This can only be seen over time as norms & trends develop.
- Historical ratios are useful for comparison.
- Graphical displays prompt questions of interpretation by line management.
- Allow time for tactical changes to feed through to new data analyses.

Tactical changes may be made to correct unfavourable trends.

* ADVANTAGES FOR LINE MGT.
* ADVANTAGES FOR SENIOR MGT.
* USUAL PROBLEMS

LINE MANAGEMENT ADVANTAGES

- Techniques are simple, with little extra record keeping necessary.
- Performance evaluation is simplified.
- Feedback is rapid on / to individuals or groups.
- Sales personnel can track their own performance.
- Rapid tactical changes are possible.

SENIOR MANAGEMENT ADV$.

- Performance readily evaluated
- Now possible to reconsider specific goals & how to achieve them

- Direct mail advertising to prospects reduces face-to-face selling time.
- Better training in standardised presentations improves the quality of sales calls.

- Time
- Discipline
- Historical documents are useless management tools. Where the objective is management, not archival.

It may take weeks or months. (Or years - to establish seasonal patterns & variations.)

- Insist on up-to-date record keeping.

Other ratios :
Sales / account,
Leads converted,
Selling / Non-selling time,
Sales to quota,
Calls / orders,
Sales to costs,
Entertainment costs / sales

SALES EFFECTIVENESS & PRODUCTIVITY (E.& P.)

* WHY MEASURE E.& P. ?
* CORPORATE INPUTS TO SELLING OPERATIONS
* 'SALES' INPUTS TO SELLING OPERATIONS
* WAYS OF MEASURING E.& P.

WHY MEASURE ?
- Sales line management needs data for day-to-day control → Mainly of tactical concern but need to understand top management's requirements.
- Top management needs data to evaluate their marketing policies → - A strategic concern but recognises the need for operational control by line mgt. - Are corporate resources producing adequate and acceptable returns ?

Each has its own measures & techniques to suit its needs. Several methods are valid, none alone is sufficient.

CORPORATE INPUTS to SELLING OPERATIONS
- To the product → - Packaging; pricing; Marketing strategy; advertising and promotions; etc.
- To the customer service → -Inventories; warehousing; accounting; distribution systems & customer service; etc.
- Budgets, to finance these → Budgets only increase if Return On Investment increases.

SALES INPUTS to SELLING OPERATIONS
- A finite number of sales calls → - Not all calls convert to sales. - Unsuccessful calls have no salvage value.
- Quality sales calls → - Standards for sales calls need to be established & each call measured against this standard. - Standards may be improved by training, planning, redeployment & other control devices.

WAYS OF MEASURING E. & P.
- Sales volumes →
- Contribution to profits →
- Market share →
- Return on capital

These are strategic considerations. Timeliness in assembling & evaluating data makes it less valuable to sales line management.
- Sales control ratios for line management → -Based on daily/weekly returns of call reports, expenses, itineraries, & orders. Gives feedback to line management & sales persons to adjust & control sales personnel & their activities. Makes interpretation of other measures more valid & tactical management possible.

SALES VOLUMES
- Sustains manufacturing BUT over reliance incurs hazards of single-fact analysis.

CONTRIBUTION TO PROFITS
- May be by product, product line, customers, channels, etc. BUT takes no account of competitor actions

MARKET SHARE
- An important measure since market share & R.O.I. advance/recede together BUT as it increases the company is vulnerable to competitive activity

CHARACTERISTICS OF AN EFFECTIVE SALES MANAGER

* OPINIONS OF LEADING MARKETING PERSONS
* AREAS OF EXPERTISE

> "As markets change, strategies & structures must change. Organisation design (of marketing/selling organisations) should start with the market place & be dominated by the chosen market strategies."
> (D.C.D. Rogers)

OPINIONS

- Sales management will become a disciplined profession.
- The sales manager of this decade will be a thoroughly educated & trained executive.
- The perceptive & successful manager will invest in a continuing education for his/her own future → Whether or not the organisation provides it.

AREAS OF EXPERTISE

Objective :- To manage sales, as well as sales people.

- Planning
- Understanding & employing financial tools
- Sales forecasting (See Outline 10.20 - 'Sales Forecasting')
- Interpersonal skills (See Outlines 9.29/30 - 'Motivating Sales Persons' 1 & 2)
- Training, Coaching & Counselling
- Communications - oral & written.
- Management styles & skills.

PLANNING

- The sales manager must participate in market planning before the plan is finalised.
- 'Link man' in a marketing/selling organisation →

Top Down		Bottom Up
- Financial goals, - Strategic plans, - Capital investment - Short-range marketing & sales plans	Senior Mgt ↕ Sales Mgr. ↕ Sales Person	- Sales figures, - Market Intelligence

- Pricing Strategies.
- R.O.I. (Return on Investment).
- Break-even analysis.
- Cost systems & estimates
- R.O.T.C. (Return on territory costs).

- Selling skills & customer presentations.
- Time & territory management.
- Interpersonal & interactive skills.
- Basic field intelligence research skills (See Outline 9.37 - 'Management Training for 1st line Sales Managers')

PAPERS

9.28 Is the Price Right ?
9.24 Selling Goods & Services for Profit
10.27 The successful Sales Manager

THE SUCCESSFUL SALES MANAGER

- ✳ SALES MANAGER'S SITUATION
- ✳ SALES PERSONNEL'S EXPECTATIONS
- ✳ SENIOR MANAGEMENT'S EXPECTATIONS

SALES MANAGER

- Objective - profitable sales with controlled expenses.
- Situation - using the tools of management, they are answerable.....
  - to the organisation for results,
  - to subordinates for leadership,
  - to the external environment (customers, suppliers, community)

SALES MGT:- The planning, direction & control of the personal selling activities of a business unit, including recruiting, selecting, training ... supervising .... motivating as these tasks apply to the personal sales force. (Amer. Mktg. Assoc.)

More & more, salespersons are sensitive, creative individuals with specialised training who are expected to perform professionally.

PERSONNEL EXPECT

- Trust. Has to be offered to be received → Fosters open, effective, 2-way comm^n.
- Professional assistance → In difficult times the manager becomes trainer, motivator, counsellor, etc.
- Guidance, in work & career objectives → Avoid problems. Capitalise on opportunities. Sharpen personal skills.
- Opportunity. The chance to take risks & grow through experience.
- Recognition.

(This adds up to a functional mix of leadership & support.)

MANAGEMENT EXPECTS

- Planning,
- Organising,
- Staffing,
- Controlling,
- Operating,
- Leadership, & .....

Possibly some selling to key accounts & high level customer contact, in addition to the above skills.

PLANNING
Co-ordinating the use of resources to accomplish objectives compatible with higher level objectives and strategic plans. → Breakdown of strategic sales plans to area & territory plans such that their sum equals or exceeds the departmental objectives.....

Also activities separate from selling but related to departmental needs. eg. accounting,
- data processing,
- R. & D.,
- purchasing,
- quality control,
- personnel management,
- customer services,
- all marketing & advertising activities.

ORGANISING (internally) the region districts & departments, etc.; teams & individuals, relating them to the external elements.

STAFFING He/she is responsible to:
- find adequate numbers of trained personnel.
- assign duties.
- train/coach them as necessary
- create a work atmosphere to stimulate their self-motivation processes.

LEADERSHIP - the vehicle of motivation. The Sales Manager functions through people.

CONTROLLING - to have in place systems to provide accurate intelligence flows to/from sub-ordinates & the organisation.
- To use this intelligence to progress toward organisational objectives & adjust the plans & operations of subordinates appropriately.

THE INDUSTRIAL MARKET (I.M.) 1 (of 2)

* WHAT IS THE INDUSTRIAL MARKET?
* CHANNEL ARRANGEMENTS
* THE 'SERVED MARKET'

THE INDUSTRIAL MARKET

It comprises .....

- 'Business, industrial, extractive & agricultural enterprises which are dedicated to the production & provision of goods & services.'
- Its demands are a composite of the economic needs of enterprise for supply-side materials, products & services.

- Segments of the I.M. are identified by the S.I.C. system. (Standard Industrial Classification.)

The variety of materials, goods & services encompasses practically everything which is provided within the economic system i.e. consumer goods & services preferentially purchased or used.

CHANNEL ARRANGEMENTS

The I.M. is identified by channel arrangements through which the market is reached :-

- Direct marketing (mail & 'phone)
- An employed sales force

Direct sales approach via :
- Independent sales agents & factory representatives.
- A direct sales force

Factors determining channel used are :
- dispersion of customers,
- product standardisation,
- size of sale,
- sale frequency.

- Probably trade-experienced persons, & often preferred to a direct sales force.
- They provide total marketing for a line of products & operate in counsellor-selling mode.
- The sales manager may have to trade off control of these representatives for better sales results.

THE SERVED MARKET

Industrial companies usually enter long-term partnerships with customers based on mutual trust & respect.

Characteristics :-

- Free of political, social or economic instability.
- Offers potential for growth & volume.
- Perceives value in non-product offerings & support systems.
- Identified by segmentation
- Looks to your company for technical leadership, product quality, reliability & continuity of supply

- With a significant proportion of actual & prospective buyers.

THE INDUSTRIAL MARKET I.M. 2 (of 2)

* THE FUTURE OF INDUSTRIAL MARKETING
* CHARACTERISTICS OF THE I.M.

FUTURE OF I.M. Lies in:-

- The need to identify & serve markets with greater efficiency & effectiveness
- Building distribution & servicing systems to assure adequate supply of product or service.
- Pre-sale & post-sale service to customers.

- Requires careful & effective market segmentation techniques.
- Facilitated by computer assisted specification schemes. (Sometimes using 25-30 or more identifiers.)

CHARACTERISTICS

- Usually finite with predictable expenditure & growth.
- Demands are derived from demand factors in consumer, governmental & international markets
- A composite of people each responding situationally to circumstances which satisfy personal needs

- Inflation inflates growth rate.
- Recession adds instability to market conditions.

- EMOTIONALLY - looking at price relative to perceived or delivered value which impact on the organisation's goals.
- RATIONALLY - balancing price against product attributes & service to determine R.O.I., profitability, growth etc.

(Industrial buyers are usually highly trained professionals)

∝ Issue 1

The effect of price variation is to alter demand. Interestingly, if the price rises incrementally, demand may not change & sometimes increases due to emotional factors.

SELLING TO THE INDUSTRIAL MARKET

✳ SELLING CHANNELS

- Own Direct Sale Force
- Manufacturer's agents or 'Reps'
- Full Service Stocking Distributors

OWN DIRECT SALES FORCE (D.S.F.)

- Best if product is technically complicated or non-standard & sophisticated.
- Often sold by sales engineers or some other technical person.

D.S.F. Considerations

- Size (value) of each sale & profit must justify the personal service given to the purchaser.
- Must carry inventory costs of items & spares until sold.
- Local stocks not maintained beyond manufacturer's premises.
- Seller absorbs all sales expenses & advertising costs.
- Manufacturer has control of entire sales function.

MANUFACTURER'S AGENTS (M.A.) or REPRESENTATIVES

- Best for simple, standardised, non-technical products.
- Reps/agents need not be technically competent in all aspects of the product.
- Cannot be expected to perform servicing for the end user.
- Do not take title on goods
- Reps/agents may have limited pricing authority
- Sell on direct fee or commission basis.

→ Manufacturer ships & drops goods to end user.

FULL SERVICE STOCKING DISTRIBUTOR (F.S.S.D.)

- Product profile may be quite diverse.
- Products purchased by FSSDs at substantial discounts (25-50% off) who accept costs & risks associated with stocking.
- Some latitude to discount to end user.
- Frequently share advertising costs for the products they sell.
- Often perform pre-sale & post-sale services for end users.

F.S.S.D. Considerations

- Manufacturer's main cost is discounting to FSSD & some advertising.
- Manufacturer's inventory costs reduced.
- Manufacturer has little control over personal function of the FSSD.
- FSSD can exert leverage on the manufacturer when competition is strong.

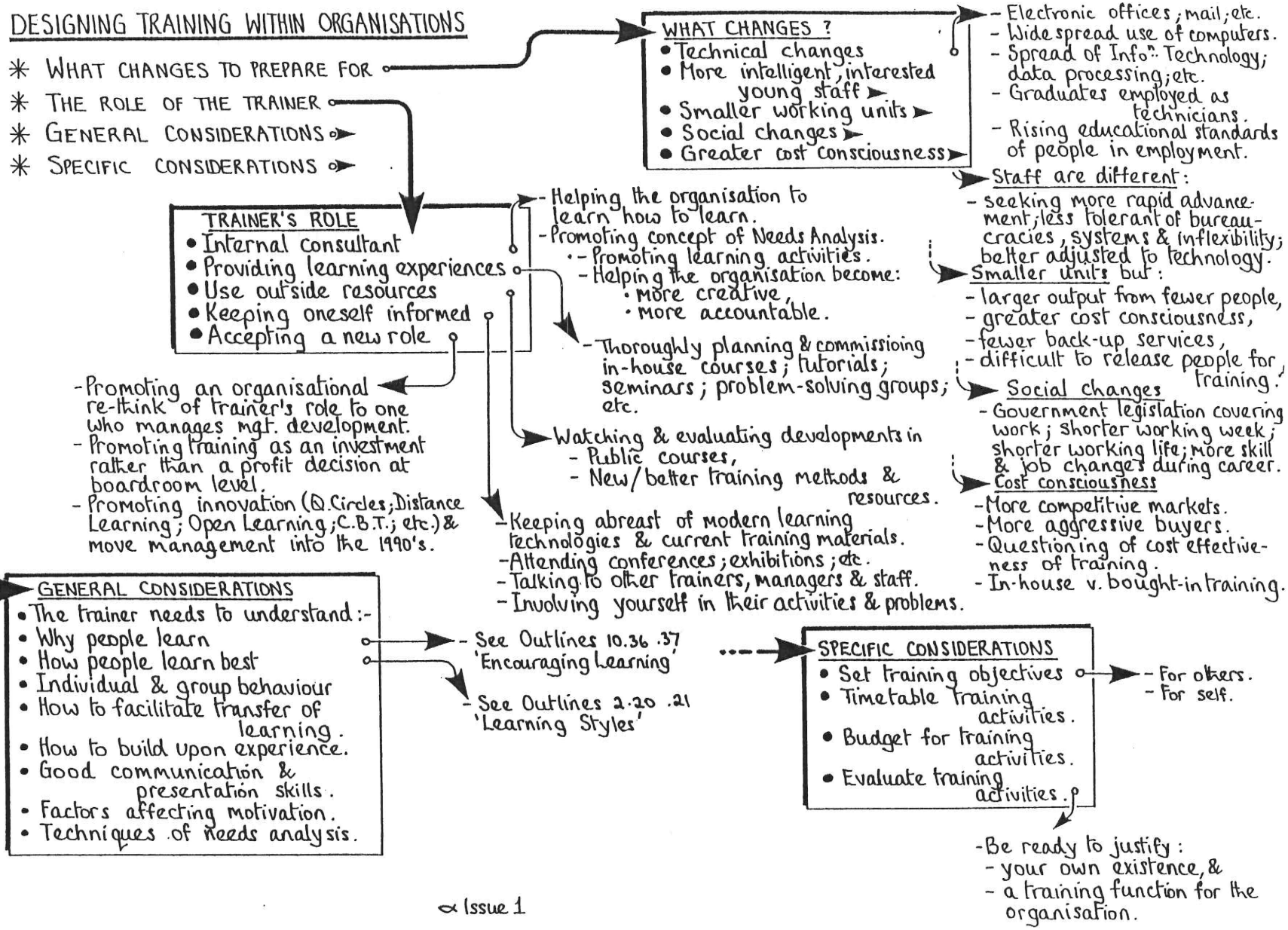
M.A. or Rep. Considerations

- Manufacturer is responsible for technical literature, price lists & possibly limited technical training of reps.
- Few direct sales costs to manufacturer other than commission & fees.
- Little control over how products are sold unless contractually defined.

N.B. Industrial buyers are usually professionals and probably highly trained personnel.

∝ Issue 1

DESIGNING TRAINING WITHIN ORGANISATIONS



REVIEWING THE ORGANISATION'S TRAINING RESOURCE NEEDS

- ✳ TRAINER EXPERTISE
- ✳ TRAINING MATERIALS
- ✳ TRAINING EQUIPMENT
- ✳ TRAINING ACCOMMODATION
- ✳ TRAINING COURSES
- ✳ TRAINING BUDGET

TRAINER EXPERTISE

Have you the skills to :-

- Run training sessions.
- Diagnose needs & select appropriate remedial action.
- Direct courses.
- Evaluate external courses.
- Lead discussions.
- Locate &/or prepare materials & equipment.
- Enthuse & motivate.
- Counsel & coach.
- Build teams.

& the knowledge :-

- to train in technical subjects.
- to use computer-based training & its applications.
- of open-, or distance-learning opportunities.
- of persons in the organisation with particular training or coaching skills.

THE TRAINING BUDGET

- How large is the training budget?
- Is the per capita sum realistic?
- Is it being used effectively now?
- Where are the points for review & re-appraisal?
- What is the organisation's commitment to training?

TRAINING MATERIALS

- Acquiring & organising training materials.
  - Storage & retrieval,
  - printing & duplication.
- Identifying effective materials.
  - exercises, games, case-studies,
  - Information papers, summaries, & outlines.

  (their sources & costs)
- Provision of films, video tapes, C.B.T. software & hardware. Finding, reviewing & acquiring.
- Developing in-house materials suited/adapted to the needs of:
  - different levels within the organisation,
  - different cultures, &
  - different levels of attainment.

TRAINING COURSES

- What is the current position?
  - about in-house courses,
  - about external courses.
- What feedback are you getting on
  - the effectiveness of this training?
  - the cost effectiveness of the training?

  (Identify areas for overhaul.)
- What courses could you run?
- What help would you need?
- What external provision is available & at what cost?
- Have you considered C.B.T., Open- or Distance Learning - courses?
- Consider local college or Polytechnic courses as an alternative to private consultants.

TRAINING ACCOMMODATION

- In-house provision. Is it:
  - large enough?
  - conveniently located?
  - flexible enough?
- What residential needs have you?
- What catering needs have you?

TRAINING EQUIPMENT

- Initial provision :
  - what is needed?
  - what is available?
- Maintenance.
- Acquisition & storage.
- Operating skills.

REDUCING TRAINING COSTS

* QUALITY TRAINING REQUIREMENTS
* WAYS OF REDUCING COSTS

QUALITY TRAINING requires :-
- Experienced tutors
- Good materials
- Good course designs
- Effective course direction
- Motivated course members
- Satisfactory accommodation

EXPERIENCED TUTORS who:
- Know their subject, are
- Able to put it over, &
- Make it relevant. Have
- Practical teaching skills,
- A caring attitude, &
- Are receptive to the trainees needs.

WHAT COSTS ?
- Company commitment
- Tutor costs
- Material costs
- Course design costs
- Course direction costs
- Course member costs
- Accommodation costs

COMPANY COMMITMENT
- Establish a climate for training as an investment.
- Establish a training budget.
- Develop a programme for training & development of managers & staff.
- Press for in-company or on-the-job development leading to reduced reliance upon ....
  - outside consultants,
  - 'prestige' trainers,
  - off-site training.

ACCOMMODATION
- Pleasant, comfortable surroundings.
- Efficient servicing.
- Relaxed atmosphere.
- NOT TOO LUXURIOUS TO DISTRACT THEM.

GOOD MATERIALS, must be relevant.
- Back-up reading, with useful, practical ideas yet easy to read.
- Aide memoire, to refer to & motivate the readers (like OUTLINES).
- Exercises, case studies & games which are fun to use, are practical & relevant to their every-day situation.

EFFECTIVE COURSE DIRECTION
- Creating a friendly & supportive atmosphere.
- Ready to listen & counsel.

MOTIVATED COURSE MEMBERS
- Accent on participation.
- Sharing experience & problems.
- Ready to listen & work together.
- Building relationships for later.
- Mutual help to overcome re-entry problems.

COURSE DESIGNS relevant to trainees needs i.e. interesting, logical, motivating, objective ... which are still hard, rewarding enjoyable work. (Don't re-invent 'training wheels'.)

ACCOMMODATION COSTS
- Reduce 'visible' acc^{n} costs by using client / company teaching & residential accommodation.
- Shorter courses reduce overnight accommodation costs.
- Less 'affluent' meals mean the course members stay awake!
- Consider local college facilities.

TUTOR COSTS
- Use company staff & trainers where possible
- Use ONE tutor where ONE tutor will suffice.
- Reduce preparation costs by:-
  - using / re-using standard sessions.
  - use course member discussion.
- Reduce travel & time off-the-job.
- Develop in-company skills & training talent.
- Consider C.B.T. (Computer Based Trg.)
- Mechanise training & record keeping.

COURSE MEMBER COSTS
- Reduce travel costs & bed & meal costs using in-company short courses.
- Short courses reduce off-the-job costs, away from work.
- Counsel trainees on need for training - don't send onto courses automatically or in rotation as a 'perk'.

DESIGN COSTS
- Company briefs course member before / after courses
- Reduce 'set up' costs through using :-
  - standard courses,
  - company facilities.
- Evaluate off-the-shelf C.B.T., Open- & Distance-Learning courses.

COURSE DIRECTION COSTS
- Lecturer / tutor / trainer is also course director.
- Administrative support uses client / company office staff.
- Use in-house tutors / trainers / managers

MATERIAL COSTS
- Use re-usable training materials.
- Let client / company print papers, provide files, pens, etc.
- Adapt commercial materials.

∝ Issue 1

DEVELOPING SENIOR MANAGERS

(For graduate intakes and personnel promoted from within the company)

* THE GRADUATE INTAKE
* WHAT DEVELOPMENT IS NEEDED ?
* DEVELOPING EXECUTIVE TALENT
* ASPECTS OF SUCCESSFUL PROGRAMMES

THE GRADUATE INTAKE

Most young senior executives are self-taught – they read.

- Encourage & build on graduate habits of self development for future executives beginning soon after recruitment.
- Plan development programmes
- Regularly interview, appraise, encourage, review & guide.

Use peer group pressure to stimulate self development.

SUCCESSFUL PROGRAMMES

- Are company & job oriented.
- Create a pool of talent.
- Stimulate involvement & commitment of line management
- Increase commitment to career & self development.

WHAT DEVELOPMENT?

- Ability to manage better
- Ability to think better
- Ability to solve problems

Looking for problems / awareness of problems

- Drawing on own memory & skills to solve it.
- Drawing on experience &/or expertise of outsiders.

MENTAL COMPONENT OF MGT.

- Memory ~ feelings / sight / sounds / words / actions / abstract forms.
- Speed of recall, the key to strategy & good decisions.
- Conceptual skills & verbal mind – allows easy absorbtion of abstract material & analytical / synthesising for planning & decision-making.

DEVELOPMENT PROGRAMMES

Enhanced by appraisals & senior management interest:

- orientation programmes,
- evening classes for professional qualifications,
- part-time M.B.A. courses,
- on-the-job coaching & guided experience,
- rotation visits to associate companies to widen experience.

[Large attendance courses produce marginal benefits]

DEVELOPING TALENT by :-

- On-the-job training through progressively difficult assignments assisted by specific formal skill training
- Enhanced by coaching & by appraisals by more senior managers

- Leading to guided experience.
- Rotation at same or higher levels to broaden experience.
- Look for willingness to develop self as a significant factor in promotion

eg.

- in-company M.B.A.s
- action learning groups
- quality awareness
- Open University & Open- or Distance-Learning courses
- Training in financial matters

SUPERVISORY LEVEL

- Training in procedures, inter-personal skills & problem solving.

MIDDLE LEVELS

- Training in motivation, leadership, problem solving with a general broadening of perspectives.

EXECUTIVE LEVELS

- Strategic planning, external awareness & handling stress.

PERSONAL SKILLS

- 'Taught' & built upon to develop sophistication.
- 'Modelled' to get the balance right.

KNOWLEDGE OF CAUSE-EFFECT RELATIONSHIPS

- Noticed by self, or
- Deduced by others & handed over, but
- Anchored in one's own experience.

INTUITIVE JUDGEMENT DEVELOPMENT

- Moving towards subconscious processing of above.
- Use of feelings to guide decisions.

DISCIPLINE / SENSE OF VALUES / MATURITY

- May need unblocking but develops over time.

DUTIES OF A COURSE DIRECTOR

* **BEFORE**
  Planning, & coordinating the resources
* **DURING**
  Course duties
* **AFTER**
  Follow up activities

PLANNING THE COURSE

- What are the objectives?
  - Are you answering specific, defined NEEDS?
  - Who identified these needs?
- Planning the programme
  - Has something similar been done before?
  - What duration & shape?
  - What can you learn or borrow from successful courses? [Don't re-invent training 'wheels']
- What papers, exercises, etc. will you need?
  - Do you have them?
  - Will you hire or buy them?
- What tutors/trainers will be required?
  - Who is available at the time?
  - Are they best suited to this particular course or subject area?
- Plan a timetable to count down to the starting date

COURSE DUTIES

- Welcome members
- Introduce tutors; objectives; administrative features.
- Attend to individuals' problems.
- Give & receive feedback to/from participants.
- Issue & receive course appraisal forms.
- Conduct course review & appraisal.

(As well as course tutoring.)

FOLLOWING UP

- Follow up individual course members if possible
  - Look for feedback.
  - Re-entry problems.
  - Considered opinions.
- Analyse course appraisal forms
- Re-design course for future use?
- Discuss course with others
  - Course members.
  - Course tutors.
  - Training managers.
  - Sponsoring managers.

COORDINATING RESOURCES

- Invite course members (advertise the course if going public).
  - Joining instructions.
- Invite suitable tutors/trainers for briefing.
- Identify & duplicate appropriate paper requirements (notes, etc.)
- Identify & procure films (video) & supporting visuals & equipment.
- Check availability & suitability of accommodation (teaching/residential)
- Organise meals; refreshments; etc.
- Design appraisal instrument.

Internal or in-house courses

- Who selects the participants?
- Who does the 'needs analysis'?
- Where & when is it best to stage the course?
- Who else in the org^n. can help tutor?

ENCOURAGING LEARNING 1 (of 2)

* ENCOURAGING LEARNING
* CHANGING BEHAVIOUR
* MANAGER'S ROLE IN THE LEARNING PROCESS

ENCOURAGING LEARNING

Successful learning will follow if tutors/trainers can :-

- make trainees want to learn
- provide the opportunities for learning to take place.

People learn when encouraged or motivated to learn.
Motivation may come from :-
- external influences,
- internal drives.

Commonly, motivation is a blend of both.

CHANGING BEHAVIOUR PATTERNS

People change behaviour when :-

- they recognise a need to change
- are secure enough to adopt or develop changed behaviour.

MANAGER'S ROLE

To assist subordinates to grow in their job through :-

- Appraisal & counselling,
- Coaching & training,
- Leading by example.

To assist themselves by :-

- Keeping abreast of current developments & technology
- Encouraging positive organisational attitude to training & development.
- Supporting the training department's activities.

TRAINER/TUTOR'S ROLE

Help potential learners :

- to examine their current circumstances / behaviour / situation.
- to see merit/value in changing their circumstances, etc.
- to experiment with change, new ideas, new skills, etc.

Then :

- assist in the adaption & implementation of new attitudes, behaviour, skills, etc.
- examine all learning methods available & select the most appropriate to the individual's circumstances.
- give feedback on progress.
- make proper use of rivalry & competition.

RECOGNISING NEED

Needs may arise due to :

- changing economic circumstances (e.g. threatened redundancy)
- peer pressure (everyone is doing it)
- new technology making it necessary, or easier, etc.
- they have a problem to be solved.
- they have a challenge to overcome.
- they seek advancement, more pay, etc.
- it's a fun activity.

Summarising - they perceive it is worthwhile doing.

ENCOURAGING LEARNING 2 (of 2)

* FACTORS AFFECTING ATTITUDES TO LEARNING
* MOTIVATING THEIR DESIRES

FACTORS TO CONSIDER
- Have their needs been established?
- Is it theoretical or practical knowledge they need?
- Will they watch, or participate?
- Are they being taught, or do they want to learn?
- Is it RELEVANT to their needs?

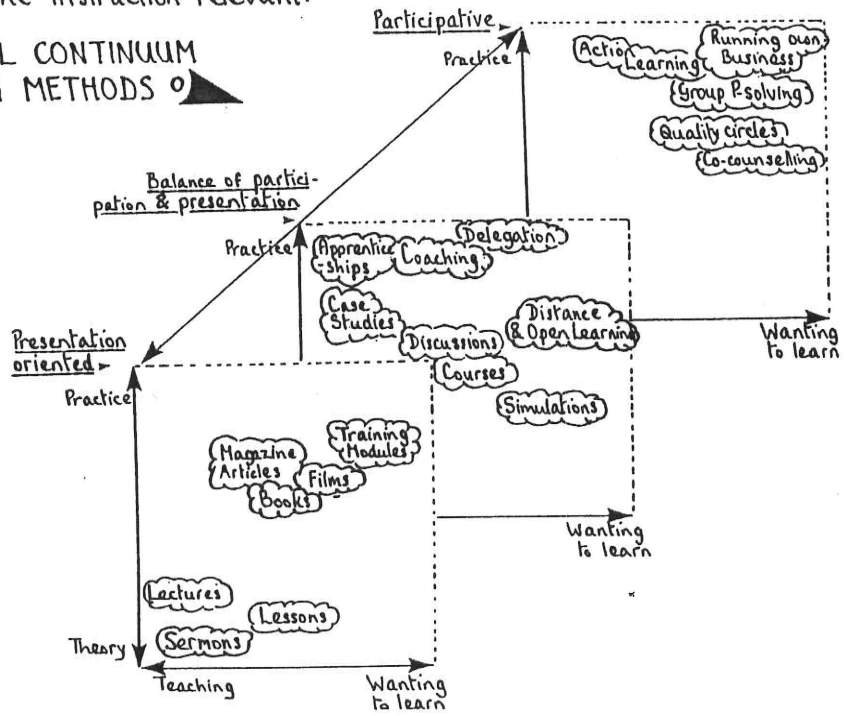
- When, how, by whom?

They desire :-
- More pay, qualifications, 'getting on'
- Greater self-esteem & be esteemed by others
- To do a job well & take pride in it
- To satisfy curiosity & intellectual achievement
- To express themselves & participate in group activities
- To be comfortable in the learning mode selected

- Show relevance, worth, & importance of instruction to the trainees.
- Report progress; use rivalry & competition; give individual attention.
- Use group activities.
- Illustrate & display work of quality
- Give praise & rewards.
- Maintain a variety of methods incorporating realism & elements of surprise.
- Allow opportunities to learn by discovery.
- Use role play & discussions.
- Keep the learning active & participatory.

- Suit the activity to the nature of the learner(s).
- Stretch the learner(s) but don't overload them.
- Keep the instruction relevant.

* 3-DIMENSIONAL CONTINUUM OF LEARNING METHODS



Chinese saying :-
I hear, & I forget.
I see, & I remember.
I do & I understand.

THE 3 ROLES OF A CONSULTANT

* THE 'EXPERT'
* THE 'PAIR OF HANDS'
* THE 'COLLABORATOR'

THE 'EXPERT'

- Decides procedures → - Expertise & experience controls events.
- Collects data.
- Gives an opinion.
- Develops solutions → - Takes initiative to define action & manages the implementation.
- Communicates by question / answer mode → - Expert ask the questions, the manager answers (or finds answers).

THE 'PAIR OF HANDS'

- Managers decide how to proceed → - Exert strong control over events.
- Managers control data collection.
- Managers develop solutions, define action & implement processes.
- Consultant follows instructions → - Communication by question / answer mode. Manager takes initiative (questions) & consultant responds.

THE 'COLLABDRATOR'

- Consultant & manager work together.
- Decisions follow discussion & agreement → - Disagreements are resolved by discussion.
- Communication is 2-way.
- Both take initiatives (depending on issues).
- Implementation is by the manager (with the consultant's help).

REWARD SYSTEMS & NEED SATISFACTION IN ORGANISATIONS

A reward system is used to co-ordinate personnel in an organisation & influence them to behave in accordance with organisational requirements.

* NEEDS & REWARDS
* EFFECTS OF REWARDS
* SYSTEMS FOR GIVING REWARDS

NEEDS & REWARDS for employees :-
- A single reward may satisfy several needs
- They are compelled to search for ways to satisfy needs
- Rewards are perceived differently by different people.

Example :-
A pay rise may satisfy security & status needs.

EFFECTS OF REWARDS
The magnitude of the effect is influenced by :-
- The intensity of the need.
- The certainty of the reward
- The cost involved

- The compulsion may not be a conscious one.
- Having found a satisfying reward, they expend time & effort to 'learn' the behaviours to :-
  - get more rewards of the same nature,
  - seek higher rewards.
- The search takes time & skill & may result in frustration & failure.

- The 'cost' (in role behaviour) may/may not always be worth the reward if self-concept is in conflict.

SYSTEMS FOR REWARDS
- Seldom can a leader (or superior) control the distribution of rewards
- Development & distribution of rewards is a complex, subtle system controlled by the org'n.
- The distribution of rewards can have unexpected side effects.

- Commonly, an awkward superior may attempt a negative influence on reward distribution to a subordinate.

* CONSIDERATIONS OF A REWARD SYSTEM
* PATTERNS OF REWARD DISTRIBUTION

- An organisation cannot give out more rewards than it has, or is receiving
- Distribution of rewards must elicit the desired, integrated behaviour from employees.
- Rewards influence sentiments towards the giver of the rewards
- Reward systems may trigger dysfunctional consequences
- (Organisations must be cognisant of the level of need activation prevalent in its members & provide a reward system congruent with the level.)

- A balance is necessary between rewards & resources.
- Loyalty or 'positive sentiment' may develop towards a superior or the organisation.

ORGANISATIONAL RIGIDITY
- People see rules & procedures as ends in themselves & lose sight of the objectives of the organisation & the purpose of their jobs.
- People avoid conflict in 'self-concept' by changing their self-image (they become INSTITUTIONALISED.)

- Learning rules & procedures which bring rewards breeds opposition to change which may require the learning of new rules & behaviours.

The 'exchange relationship' underlies classic wage & economic theory.
- Rewards given for attaining or exceeding agreed standards
- Rewards may be given on attaining a preferred position (promotion)

- Leads to WIN : LOSE situations.
- Leads to competition & sometimes anti-social actions by rival competitors.

- Provides a basis for employee self-evaluation; also to evaluate people & rank them.

Working with any organisation, the employee accepts an 'exchange relationship' exchanging service & skills in return for need satisfaction by the organisation.
A REWARD contains 2 elements, something given in return for something provided.

INTERPERSONAL SKILLS TRAINING

* WHY IS IT VALUABLE ?
* HOW DOES IT BENEFIT MANAGERS ?
* WHAT IS IMPLIED ?

WHY ?

A manager will interact with a variety of persons internally & outside the organisation.

- Our educational system produces intellectual competence → BUT neglects interpersonal skills & working with feelings.
- We are aware of cultural differences in our multi-ethnic society → BUT how can we modify our behaviour & attitudes to co-exist harmoniously
- We continually send out 'messages' → By verbal & non-verbal means. - Through our attitudes & behaviour.
- We continually receive 'messages' from others → Putting them through a personal 'filter' to interpret the attitudes & behaviour of others. - If verbal & non-verbal constituents differ, the non-verbal message is 'heard' because it is harder to disguise &/or control it.

HOW DOES IT BENEFIT ?

- Understanding interactions helps in controlling/managing messages → Avoiding or reducing the potential for misunderstanding & conflict. - Helping to create shared objectives. - Assisting maintenance of intergroup and intra-group harmony.
- Useful in a variety of circumstances
- A feature of personal development

Examples :
- How to make & accept apologies.
- How to clarify points of view.
- How to avoid WIN:LOSE situations & reach WIN:WIN solutions.
- How to divert attention.
- etc.

All the skills involving communication with superiors or subordinates :
- Negotiating, - Appraising,
- Coaching, - Training,
- Counselling, - Giving & receiving orders.

WHAT IS IMPLIED ?

- Discrimination of a range of behaviours.
- Modelling of behaviour & clarifying concepts
- Practising behaviours → - Practising changes. - Noticing what is NOT done.
- Increasing our repertoire of behaviours → - For coping with our own feelings - For intervening with others. - To enlarge our own person.
- Reconciling our current repertoire of behaviour & degree of personal development → - Removing rigidities by examining our attitudes.

∝ Issue 1

MANAGING YOUR BOSS

* KNOW YOUR BOSS
* KNOW YOURSELF
* MANAGING THE RELATIONSHIP

N.B. For convenience on this Outline the manager is assumed to be female. This avoids he/she; him/her; no discrimination implied.

KNOW YOUR BOSS

What does she want :-
- From her life
- From her work

What are her :-
- Likes & dislikes
- Strengths & weaknesses
- Preferred management style

FROM LIFE

- Tangible needs - are frequently less important than imagined
- Intangible needs have considerable importance
  - Quiet comfortable life; power; status; safety; recognition; affection; etc.
  - Success; more money; growth; greater productivity.

STRENGTHS & WEAKNESSES

- How does she.....
  - work with people,
  - manage herself & use time,
  - react to uncertainty & risk,
  - get things done,
  - react to pressure & stress,
  - use (or mis-use) your time.

FROM WORK

- Personal objectives like growth; achievement; esteem; recognition; social affiliation; survival; self realisation; etc.
- Organisational objectives like profit; revenue; long-term survival; etc.
- From you - help; co-operation information; honesty & dependability & the minimum of bother.

PREFERRED (MGT.) STYLE

- Intuitive v. organised & formal.
- Highly involved v. delegated.
- Passive / assertive / aggressive.
- Autocratic v. democratic.

LIKES & DISLIKES

- How does she like to receive information & ideas ?
  - Written, to think it over ?
  - Spoken, to talk it over ?
- Does she tolerate interruptions or make appointments ?
- Will she accept formed solutions or preliminary ideas.

KNOW YOURSELF

What do you want :-
- From life.
- From work.

What are your :-
- Likes & dislikes.
- Strengths & weaknesses.
- Preferred working style.

MANAGING THE RELATIONSHIP

Work together in symbiosis, sharing strengths & removing or avoiding sources of conflict.
- Ask her what she wants.
- Write down key aspects of your job & find an excuse to discuss them.
- Seek her views on 'good mgt.' & her 'objectives'.
- Become involved in planning with her & her boss & observe.
- Try to remain open, creative & flexible.

YOUR WANTS FROM WORK

- Some freedom & independence of action.
- Opportunity to learn from her.
- Resources to do your job.
- Fairness, consideration, co-operation, & communication.

SYMBIOSIS - a term used to describe how (in nature) two ~~different~~ organisms unite to create an existence where each is dependent on, or has an advantage from the other.

MOUNTING A DISPLAY

* WHY A DISPLAY ?
* WHERE TO DISPLAY
* WHAT TO DISPLAY

WHY A DISPLAY? Whether the display is giving information
- for selling something, → Exhibitions; shows; roadside hoardings; etc.
- offering instruction/direction,
- exhibiting something, → For interest or prize seeking purposes.

aim for VISUAL IMPACT & eye appeal.

WHERE TO DISPLAY
- A location which permits maximum exposure → Exhibition stands & sites (indoors & in public places)
  Waiting spaces (halls; reception areas; dining rooms; etc.)
  Meeting rooms (to inform; impress; reinforce messages; etc.)
  Screens in cinemas, etc.
- On display surfaces → - Wall mounted. - Table layouts. - Free standing. (Depends on the nature & size of the exhibit.)
- In lighted areas → - Consider natural, ambient light levels & any need for additional lighting. (Floodlights; striplights; spots; etc.) - What is the effect of artificial light on the exhibit? (eg. yellow streetlight)
- How mobile are the viewers? → - Seated (halls); walking (expos); slow/fast moving (billboards, escalators) etc.
- How important is security? → - Is security a factor? - Freedom from vandalism? - Not potentially dangerous to the viewers?

WHAT TO DISPLAY
- Realia - can you reasonably display the real object full size?
- Pictures - always preferred to words → - Internationally recognised & understood. - Relies on inate ability to 'read' pictures. (VISUAL LITERACY)
- Symbols
- Words
- Use of support materials → eg. plants; drapes; objects; accessories; objects d'art; etc.

* USING WORDS
  - Fewer the better → - Short words &/or phrases. - Easy-read phrases. - Avoid abbreviations - Can add humour to the display.
  - Upper- or lower-case → - U-case for titles (more emphasis). - L-case for text (more easily read).
  - What size letters are most legible?

* USING COLOUR
  Consider colour of :-
  - Backgrounds → For emphasis; mood; contrast; etc.
  - Principals → Adds interest; eyecatching; or for coding.
  - Pictures/diagrams → Always attracts more attention than black & white.

* USING FIXATIVES
  - Are mountings necessary?
  - Are exhibits re-usable?
  - What fixatives? → Governed by size & weight of the display & the surface to cover. - Visible or invisible supports.
  - To what surfaces? → Hard; smooth; fabric; textured; etc? - Complementary or contrasting colour?

USING AN OVERHEAD PROJECTOR (o.h.p.)

- ✳ WHY USE AN O.H.P. ?
- ✳ GOOD O.H.P. USER TECHNIQUE
- ✳ PREPARING YOUR OWN VISUALS
- ✳ IMPROVING YOUR VISUALS
- ✳ IMPROVING AUDIENCE RECALL

WHY ?

- They demand attention
- Manufacturers are continually improving designs
- More off-the-shelf materials are available in many subject areas
- No blackout facilities required.
- Easy to use & prepare materials
- Screens desirable but not essential.
- Speaker faces audience all the time & maintains eye contact & rapport.

- Used effectively, they give VISUAL IMPACT to your presentations.
- If well presented, watchers recall what is seen more than what is heard.
- Lighter in weight, smaller & more portable.
- Silent in operation (no fans)
- Cold light sources have longer life, safer to handle.
- More intense lights.
- Improved achromatic lenses give clearer images.

IMPROVING RECALL

- Photocopy acetates as handouts.
- Distribute them at the presentation.
- Trainees write onto the handouts.

TECHNIQUES

- Switch on - to draw attention to the visual on the screen/projector.
- Switch off - to remove/replace visuals
- Revelation technique
- Using overlays
- Using a pointer

- Also to return attention from screen to speaker.
- To avoid distraction if visual displayed is no longer relevant.
- Slowly reveals visual to give information incrementally & heightens interest/curiosity in what is still unrevealed.
- Rest the pointer on the visual on the projector.
- Make every movement slowly as the projector also magnifies the speed of every movement.

IMPROVING YOUR VISUALS

To increase their VISUAL IMPACT use :-

- Colour
- Pictures
- Graphs & symbols
- Boxing & underlining

- For emphasis & grouping items.
- Reduces the need to read words & figures for better non-verbal communication.
- For better non-verbal communication; add humour; increases understanding
- For interest; coding; contrast & emphasis.

PREPARING VISUALS

By hand

- Use template under the acetate sheet with pre-determined graph lines to assist spacing, etc.
- Use capitals for titles/headings & lower-case letters for text (6 mm.)
- Maximum 10 lines per acetate.
- Maximum 6-8 words per line.

By machine

- Use photocopier, preferably with ZOOM facility.
- Cut out & paste up text from various sources following guidelines above to produce a paper master.
- Enlarge it to occupy fill 10 inch (25 cm) maximum dimension.
- Using the larger master, pass any acetate sheets through the copier

- Produces black image on clear acetate.
- Use coloured acetates for background contrast.
- Add colour by pen or self-adhesive film if desired.

USING TRAINING 'OUTLINES' (& HANDOUTS)

* WHY USE HANDOUTS ?
* WHY USE 'OUTLINES' AS HANDOUTS ?
* WHEN TO USE HANDOUTS

Handouts are useful training aids but can be rendered less effective when used without understanding.

WHY USE HANDOUTS ?

- Reinforce the spoken word
- Give supplementary information.
- To direct further studies & follow ups
- To provide common background info.
- Reference notes for tutor/trainer.
- For questionnaire to assess learning.
- To show the training session outline

- An 'aide memoire'.
- Reference to topic(s) covered.
- Copies of visual aids used.
- OUTLINE for taking/adding own notes.

WHEN TO USE HANDOUTS

- Before the session/course
- During the course
- After the course

(Different timings produce different results. The trainer must decide.)

Problems

- Often filed & never read.
- May get lost.
- No opportunity remains to question the contents & the ideas with the tutor present.

- Permits a break in activities.
- Everyone is seen to receive one.

Problems

- Allowing time to read them if they are extensive.
- May distract from other activities.

WHY USE 'OUTLINES' ?

- Basic information schema, logically presented & unbiased.
- Short-course trainees don't want to spend time notetaking
- They are better quality notes than trainees will take unaided.
- Prompts participation, discussion & 2-way communication
- Useful for less experienced trainers or those working in fresh areas of expertise. (ideas for o.h.p. transs.)
- Their unusual format & nature makes them compulsive reading for trainees

- When the trainee knows where the session is going, it makes it easier to :-
  - build links with existing knowledge.
  - know when you've 'arrived'.
  - prepare to question yourself & the trainer.

- They want fresh ideas quickly with the opportunity to discuss their relevance to their own circumstances.

- Even if trainees disagree with the information they can say so & this promotes thinking activities. Particularly useful for senior manager development.

- Gives trainees time to prepare their thoughts & plan activities.
- A supplement to course activities
- Instructor can refer to them.
- Gives all participants common background knowledge.

Problems

- Remain un-read.
- Left behind!
- Misunderstood or forgotten.

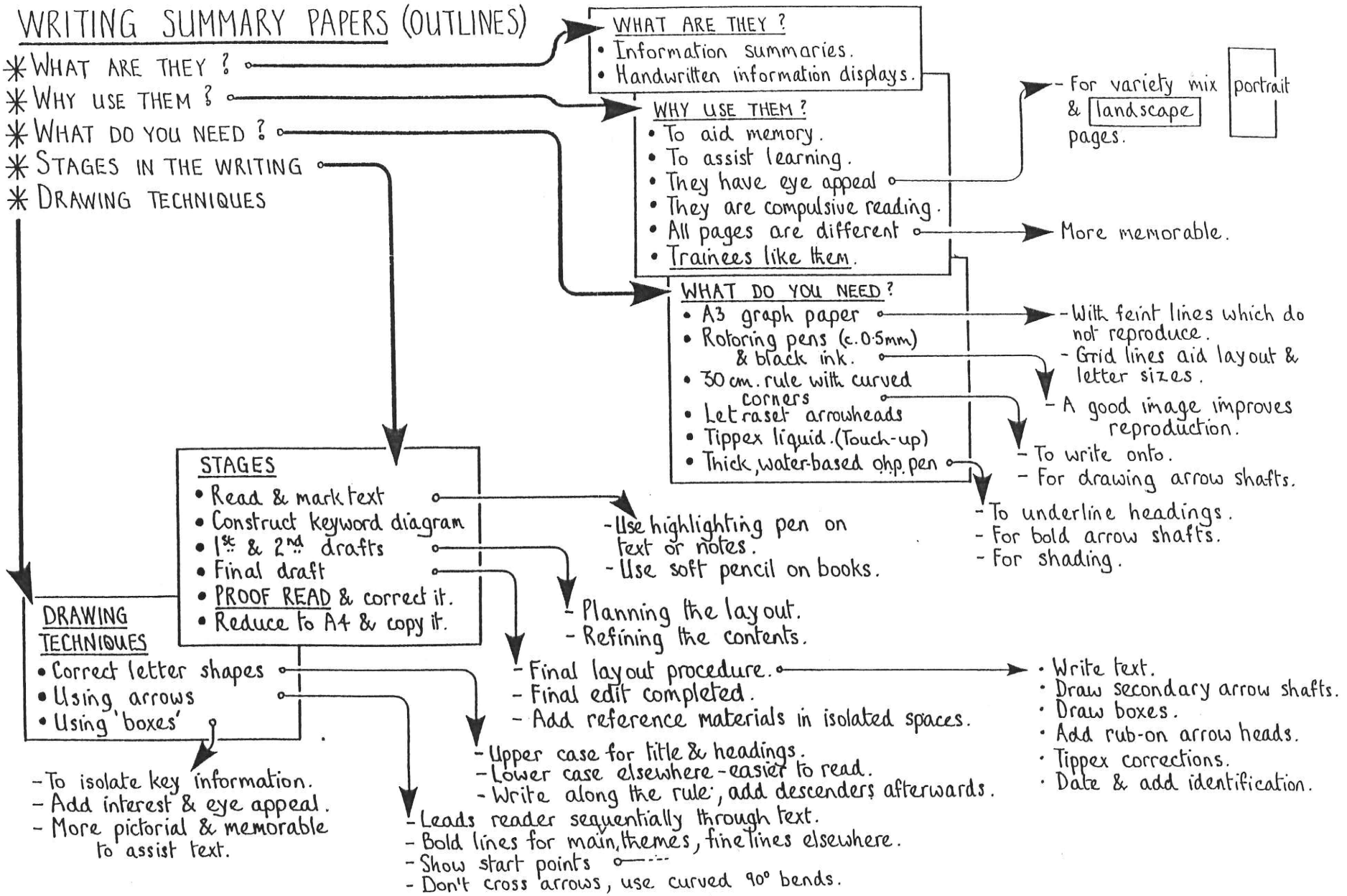
Used selectively & issued singly during training sessions.....

- Trainees read them thoroughly when received so permit reading time,
- it's all on one side of A4 paper.
- no two sheets are the same (more memorable than typed notes.)
- more 'readable' than A4 printed pages.
- can be 'fleshed out' with the range of typed information papers available.

∝ Issue 1

WRITING SUMMARY PAPERS (OUTLINES)

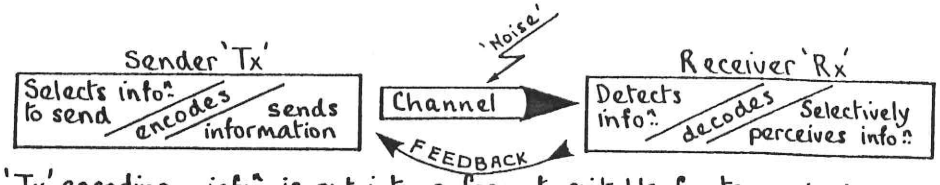
- ✳ WHAT ARE THEY ?
- ✳ WHY USE THEM ?
- ✳ WHAT DO YOU NEED ?
- ✳ STAGES IN THE WRITING
- ✳ DRAWING TECHNIQUES



COMMUNICATION WITHIN ORGANISATIONS

Sender/transmitter 'Tx'
Receiver 'Rx'

* BASIC 1-WAY COMMUNICATION MODEL → OBJECTIVE :- error-free transmissions.
* FORMATION OF COMMUNICATION NETWORKS
* TYPES OF NETWORK



'Tx' encoding - info.ⁿ is put into a format suitable for transmission.
eg. numbers & symbols on a requisition form.
'Rx' decoding - interpreting those symbols before actioning the communication → no undesired selectivity of interpretation.
'Noise' - anything which hinders or distorts the transmission.
'Feedback' - promotes the accuracy of the transmission.
'Word redundancy' - increases the possibility of selective interpretation by Rx.

FORMATION OF NETWORKS

Networks are established :-
- FORMALLY - to facilitate information flows vertically &/or horizontally
- INFORMALLY - in response to the organisation members' needs
- Formally planned communication networks never cover all eventualities.
- Individuals will always establish their own for the purpose of co-ordination.
- Networks of comm.ⁿ influence the performance of groups within an org.ⁿ.

FORMAL eg. 'chain of command' for ⇊ flows, carries selected info.ⁿ which is often NOT widely disseminated.

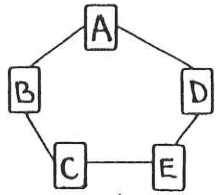
INFORMAL eg. 'grapevine' for ⇌ flows. Communication relates to a need & can be very accurate.

TYPES OF NETWORK

- Circle
- Wheel
- Chain
- 'Y'

Channels are shown as links between persons in a network. They may be 1-way (T.V.) or 2-way (telephone).

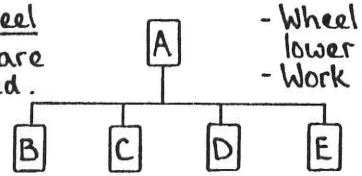
Circle



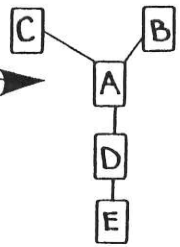
eg. Active, leaderless, unorganised groups. Members worked accurately but slowly & indicated high levels of task satisfaction in tests.

Wheel

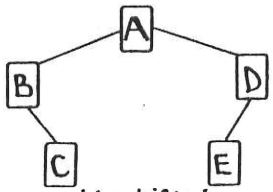
-Leaders are identified.



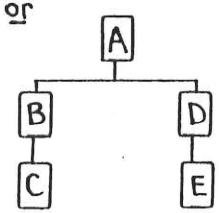
- Wheel members indicated lower levels of task satisfaction.
- Work accurately & fast in tests.



Chain

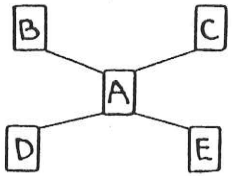


or



-Leaders are identified.
-Hierarchical in nature

or



Words & written English have a high 'redundancy' (50%) - not necessary to the comm.ⁿ but required by rules of spelling & grammar.

COMMUNICATION & CO-ORDINATION WITHIN ORGANISATIONS

* COMMUNICATION & CO-ORDINATION
* TYPE OF INFORMATION CARRIED
* FACTORS WHICH INFLUENCE COMMUNICATIONS

COMMUNICATION & CO-ORDINATION

- We communicate to influence the behaviour of others.
- Organisation is about the co-ordination of activities, information, people, etc.
- Communication is central to the organisational function of co-ordination
- For many other functions, comm^n is an independent variable or constraint.

TYPE OF INFORMATION may be :-

- Relevant to the organisation's tasks → - Day-to-day running of org^ns activities.
- Necessary for learning → - Market research; quality control; etc.
- Important to the social life of the group members within the org^n → - Holiday rosters; promotions; etc.

INFLUENCING FACTORS

- Division of work between subunits → - Departmentalisation determines in part *who* communicates *what* & *to whom* within an organisation.
- Establishment of rules → **RULES** establish:
  - with whom you must communicate information,
  - what channel to use,
  - the form it takes,

  (eg. a stationery requisition)

  RULES can also frustrate though well-intended to :
  - exclude unimportant messages,
  - prevent over-use of channels,
  - ensure codes are correctly interpreted.
- Organisation's internal stability →
- Leadership → **LEADERSHIP** influences :
  - The selection of information entering the channels.
  - The network & directionality of channels.
  - Programmes & codes to be used eg. when leading a problem-solving group discussion.
- Filtering → **FILTERING** is governed by an individual's perception of
  - what you want to hear from others &
  - what you want others to know.

  Filtering is a problem particularly in the hierarchical flow of information where status & power are significant.
- Hierarchical position → **HIERARCHICAL POSITION**
  - Persons high in a hierarchy tend to have more information relevant to the organisation & communicate it more.
- Individual competence → **COMPETENCE**
  - Where people have a choice of whom they deal with they will tend to direct their communication towards persons they respect as being highly competent.

STABILITY

- Stable, predictable → day-to-day comm^ns
- Dynamic → adds on purposeful info^n flow to bring about learning eg. market research.
- Crisis → both of above & info^n fundamental to survival which **MUST** be transmitted.

FACTORS HINDERING EFFECTIVE COMMUNICATIONS

Tx - Transmitter Rx - Receiver

* FACTORS CONCERNING YOURSELF
* FACTORS CONCERNING THE OTHER PERSON
* FACTORS IN :-
  - THE MESSAGE
  - THE CHANNEL
  - THE LOCATION

ABOUT YOURSELF If you are in the role of Rx :-

- Preoccupation, with own thoughts & feelings obscures message.
- Emotional blocks, caused by the use of value-laden words, or
- Stereotyping of the Tx. Leads to selective perception of the message.
- Past experience, pre-disposes us to distort messages.
- Need to know. Is the information you are receiving important or not?

ABOUT THE OTHER if in the role of Tx :-

- Charisma. Tx may have an important message but can not hold our attention
- Inarticulateness - lack of verbal skills may distort the intention of the Tx.
- Tx's physical appearance may create temporary barriers to being accepted.
- Perceived attitude towards the Rx
- Status of Tx vis-a-vis Rx

- Conversely, a charismatic person may 'sell' themselves with the message such that the Rx does not question it or seek clarification.

THE MESSAGE

- Hidden agendas - individuals hear message with reference to their own needs or mis-read them expecting some ulterior motive behind it.
- Emotive words - colour one's perception
- Use of language

Language may carry several problems to communications eg.

- semantics (what do words mean),
- restricted or elaborated code of speech,
- regional or national accents colour perceptions.

Status will encompass most factors in 'self' or 'other':-

- Communication is easier if the perceived power differential is low i.e. peers communicate easily & with fewer hindrances. If power (status) differentials are large then problems may be anticipated.
- Knowledge differential between Tx & Rx establishes status eg. 'expert'.

Examples

- Defensive, sees questions as accusations & turns replies into justifications.
- Hostile / interested.
- Motivated / bored.
- Knowledgeable.
- etc.

Attitudes may be perceived in the non-verbal aspects of the inter-personal communication, like, posture; tone of voice; loudness; pitch; speed; stress; etc.

THE CHANNEL

- Is this the best way to communicate this message?
- Is the Rx the right person? Can they act?
- What feedback channel is available?

THE LOCATION

- Can we hear & see unhindered?
- Can we communicate in comfort or without physical distraction?
- How close can we get (proxemics)?
- Where shall we sit/stand (orientation)?

DEFENSIVE COMMUNICATION (D.C.)

- ✳ WHY DO PEOPLE BECOME DEFENSIVE ?
- ✳ WHAT IS DEFENSIVE BEHAVIOUR ?
- ✳ WHEN DO PEOPLE USE D.C. ?
- ✳ BEHAVIOUR CHARACTERISTICS WHICH
  - -AROUSE DEFENSIVENESS
  - -REDUCE DEFENSIVENESS

WHY BECOME DEFENSIVE ?

Concern over :-

- How you appear to others,
- Being seen more favourably,
- To win, dominate or impress,
- To escape 'punishment',
- To mitigate / avoid a perceived / anticipated attack.....

....by others in the group.

Tx = Transmitter Rx = Receiver

Since the purpose of comm.ⁿ is to pass a message from the Tx & produce a reaction / change in the Rx eg.

- new attitude,
- new behaviour.

Defensive communication has a distorting effect.

WHEN DO PEOPLE USE D.C. ?

- When the Rx perceives the Tx is engaged in a stratagem of ambiguous or multiple motivations
- In response to others' defensive communication.

DEFENSIVE BEHAVIOUR

results in :-

- Selective listening & interpretation of motives.
- Distorted filtering & perception of the communication of others in the group.

(• Postural, facial & non-verbal cues are mirrors to inner feelings.)

- Arousal of corresponding defensive behaviour in others in the group.
- A downward spiral to less effective communication.

CHARACTERISTICS WHICH AROUSE DEFENSIVENESS

- Evaluative speech or behaviour
- Efforts to control others
- Where neutrality is implied
- Where self-perceived superiority of Tx is apparent
- Where dogma implies certainty of Tx's values

- -Implying blame or making value-loaded statements.
- Resulting in group members perceiving themselves of little worth, especially if speech communicates little warmth or caring for members.
- - Results in Rx perceiving feelings of inferiority.
- - Tx is 'always right.'
- - Rx who disagrees is 'wrong.'
- -Superiority in position, wealth, intellect, etc. which arouses feelings of inadequacy in the Rx.

EXAMPLES

- -Taking on a role.
- -Feigning emotion.
- -Toying with colleagues.
- -Withholding information.
- -Indicating special information sources (not available to others.)

BEHAVIOURS REDUCING DEFENSIVENESS display :-

- Empathy
- Equality
- Spontaneity

- -Communication which conveys respect for feelings & worth of Rx & their acceptance at face value.
- -Discounting differences in talent; ability; worth; status; power; etc.
- -Implying no predetermined attempts to 'attack' or denigrate the Rx.

INTERPERSONAL SKILLS - CONFRONTING & SUPPORTING

* WHAT IS CONFRONTING ?
* HOW TO CONFRONT
* WHAT IS SUPPORTING ?
* HOW TO SUPPORT

CONFRONTING is to make explicit the differences between :-

- What you value & what the other person values
- What you think & what the other person thinks
- What you feel & what the other person feels
- What you want to do & what others want to do
- What you actually do & what others actually do
- What the other person says & then actually does

- You risk making the other person angry & defensive.
- Someone may have to change their behaviour (it may be you.)
- You risk hurting the other person's feelings.

SUPPORTING is :-

- Demonstrating acceptance of the other person no matter what they think, say or feel. (It does not imply you agree or feel the same way.)

Support - their right to feel differently from you in this situation.
- their fears, doubts, anxieties, etc.
- the reality of their perceptions though they may differ from yours.

HOW TO CONFRONT

- Acknowledge the other person's opinion/position as legitimate.
- Differentiate their position from yours.
- Check that you have heard & understood them clearly, & they understand you too.
- Accept that angry/hostile feelings in them (& you) are real. Control your feelings.
- No problem solving until differences have been explained & understood.
- Request other's preferred solution. Be ready to state & differentiate your preferred solution.

HOW TO SUPPORT

- Listen
- Reflect back, re-state what you have been told using the same or different words.
- Accept what is being said is real, to them.
- Ask what help is needed & help if you can.

Don't

- Offer your solution, at least until they have explained the actions they want to take. → Don't give unsolicited advice.
- Generalise - it's not helpful.
- Tell them they shouldn't think, say, feel like that.

∝ Issue 1

Paper :-
Outline .06 'The helping relationship'

Contents

	Page No.
PART 1 PERSONNEL MANAGEMENT	
Job Sharing	11.01
Homeworking (Tele-working or Flexiplace)	11.02
Flexible Dayworking Patterns	11.03
New Employment Strategies 1	11.04
New Employment Strategies 2	11.05
Subcontracting	11.06
Outplacement Consultants in Career Management	11.07
Executive Search (Headhunting)	11.08
Co-counselling 1	11.09
Co-counselling 2	11.10
A Management Approach To Substance Abuse 1	11.11
A Management Approach To Substance Abuse 2	11.12
Substance Abuse - Impaired Performance	11.13
Managing for Wellness 1	11.14
Managing for Wellness 2	11.15
Managerial Responsibilities & Health	11.16
Learning about the Organisation	11.17
New Work Ethics	11.18
New Managers - New Ideas	11.19
New Organisations - New Concepts	11.20
People & Production/Operations Management	11.21
Increasing Work Rewards	11.22
Remuneration & Performance Related Rewards	11.23
Remuneration (for hourly paid)	11.24
Giving Recognition	11.25
Knowledge as a Motivator	11.26
Improving Employee Participation	11.27
Managing People - Group Values	11.28
Attributes of Groups 1	11.29
Attributes of Groups 2	11.30

PART 2 MARKETING

The Nature of Marketing	11.31
Strategic Market Planning	11.32
Understanding Marketing Assets	11.33
Developing Competitive Advantage	11.34
Achieving Product Differentiation	11.35
Understanding the Competitive Environment	11.36
The Broader (Macro-) Environment	11.37
Consumer Markets & Buyer Behaviour	11.38
Industrial & Organisational Markets 1	11.39
Industrial & Organisational Markets 2	11.40

PART 3 COMMUNICATIONS

Selecting a Communication Strategy	11.41
Communications	11.42
The Meeting of Minds	11.43
The Deeper Mind Levels	11.44
The Influencing of Minds	11.45
Conditioning Responses during Interpersonal Communications	11.46
Behaviour Patterns at Meetings	11.47
Use & Abuse of Meetings 1	11.48
Use & Abuse of Meetings 2	11.49
The Role of the Meeting's Chairman	11.50

KEYWORD INDEX 51-54

JOB SHARING

- ✳ WHAT JOBS ?
- ✳ WHY SHARE ?
- ✳ TYPES OF WORKING PATTERNS
- ✳ POTENTIAL DISADVANTAGES

Job Sharing – two employees share the responsibility of 1 full-time position with salary, paid leave, pension rights & fringe benefits divided between them 'pro rata' on time worked.

WHAT JOBS ?

- Any job where the premise is that a full-time job could be performed by 2 persons on a shared basis.
- In practice, mainly clerical or secretarial jobs
- Professional jobs

– Tasks are easily identified & divided.

– Teachers; librarians; social workers; doctors; personnel & training officers; etc.

WHY SHARE ?

- Many female workers want to continue in work & maintain their family role.
- Many people only want part-time work.
- As a means of reducing unemployment.
- As a prelude to retirement
- As a means of training or 'introduction to work'.

– Increasing leisure time for the job leaver, part-time work for the incoming person (possibly a youngster).

WORKING PATTERNS

- Alternate week working.
- Split-day working
- Split-week working
- No fixed schedule

– Not cost effective for workers since costs in time & money for travel are disproportionately high.

– Single most popular model.

– Has advantage of flexibility but needs close supervision.

POTENTIAL DISADVANTAGES

- Some administrative costs could be doubled eg. recruitment & selection; seeking references; writing contracts...
- Communication of information TO both job sharers & BETWEEN them must be ensured in some way.
- Supervision & work allocation is complicated & needs co-ordinating.
- If job sharers have different levels of competence .....

..... the division of responsibility is complicated. Delays may arise until job sharer returns to work to sort out their own particular problems.

- ✳ ADVANTAGES OF JOB SHARING
- ✳ IMPLICATIONS OF JOB SHARING SCHEMES

- Reduced labour turnover
- Reduced absenteeism
- Greater continuity
- Greater effort
- Wider skills available
- Wider pool of employment
- Train 2 young persons for the price of 1
- Eases older persons into retirement

If job is tedious or high-pressure normally.

– If employees full-time work does not suit personal needs.

Job sharers' shorter week is less tiring.

People who cannot consider/be considered for full-time positions.

- Management must be commited to it
- Unions must be consulted
- Pension rights are affected
- Job sharing needs to be promoted to the existing staff & supported

– To clear misunderstandings & mis-information.

– Managers to be fully briefed before any scheme is adopted.

– Their support is vital; often job sharing is requested by them.

– Former full-time staff need to know this.

Absenteeism – employees have ample time for personal, domestic & family requirements.

Continuity – if one job sharer goes sick, only half the work is lost.

Skills – 2 sets of knowledge & skills for the price of one.

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HOMEWORKING (TELE-WORKING OR FLEXIPLACE)

* WHAT IS HOMEWORKING ?
* ADVANTAGES OF HOMEWORKING
* DISADVANTAGES OF HOMEWORKING

WHAT IS IT ?

- Employees work at home instead of in an office, shop or plant.
- Providing modern technology permits, employees could 'network' from home
- Homeworking includes outworkers, particularly in clothing & allied industries

'Homeworkers' could include self-employed professionals, consultants, skilled tradesmen, typists, etc.

- Or a mix of part office / part homeworking - permits off-peak travel to & from work.
- Widens the scope of possible activities which could be undertaken.
- Communicates daily with the office through telephone modems which is feasible & cost effective.
- Work is delivered to / collected from their homes.

ADVANTAGES

- Opens job opportunities to a new, wider range of workers who could not normally commute to work
- Lower work-related expenses for the employees
- Lower work-related expenses for the employers
- Can solve the shortfall in computer programmers & data analysts
- Lower requirements for office space & associated overheads
- Researchers claim increased productivity (Boss & employee must both want the system to operate.)

- Greater employee satisfaction is possible.
- Available to handicapped; disabled; single-parent families; home-bound; part-timers; etc.
- Saves commuting; time; meals; etc.
- Rent; heating; lighting; cleaning; secretarial support.
- Increased work throughput without extra space.
- In office-type occupations; & low absenteeism.

EXPENSES If outworkers are self-employed, employers save on insurance & pension contributions; holiday- & sick-pay; administration costs; etc.

SHORTFALL As a rule the company would provide the electronic hardware; pay telephone installation & user costs; etc.

DISADVANTAGES

- Can homeworkers develop the self-discipline to put in 'X' hours of work per day ?
- Loss of social interaction with other company employees which develops corporate spirit
- Employees are more unsupervised than in conventional work practices
- Supervisors find their job more difficult.
- Less easy to unionise & organise workers
- Unsuited to all types of work.
- Employer has only a moral responsibility for employees in absence of H. & S. legislation.

- There are potentially more distractions than would be the case in an office.
- Cannot attend meetings.
- Loss of personal contact with your 'boss'.
- Some workers want the social interactions as much as the money.
- Albeit for their own protection. Workers could be exploited.

UNSUPERVISED Increased elements of mutual trust are required between employee & employer. Needs special attention to administration & control mechanisms.

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FLEXIBLE DAYWORKING PATTERNS

* TYPES OF FLEXIBLE PATTERNS
* COMPRESSED WORKING WEEK

TYPES OF PATTERN

- Flexible daily hours
- Flexible weekly hours
- Flexible daily & weekly hours
- Compressed working weeks
- Annual hours concept

The traditional pattern of fixed daily or weekly working hours with overtime paid on extra hours may NOT be the most cost-effective means of organising 'man-hours'.

FLEXIBLE DAILY HOURS

Where workloads vary on a regular daily basis eg. M. + Tu. busy ; Th. + Fri. slack ; (or retailing) M - slack & Sat - busy.

- Employees' hours are re-distributed across the week without need of overtime or premium rates. Part-time staff help at peak times or to reduce bottlenecks.
- Includes FLEXITIME. Workers still work pre-established hours / week or fortnight. Employees choose (within reason) their own clock on/off times. Needs elaborate computerised record keeping.

Advantages

- Reduces absenteeism & tardiness.
- Reduces peak hour travel problems.
- Permits time for family or personal matters.

(Morale problems may arise in employees denied the right to FLEXITIME.)

COMPRESSED WORKING WEEK

- Potential employer benefits are:-
  - Overheads reduced on days not worked.
  - Longer working days - extends use of capital equipment on days worked
  - Increased productivity.
  - Better industrial relations; lower labour turn-over; better recruitment.
- Potential employee benefits are:-
  - Reduced week, commuting time & associated costs.
  - More usable chunks of time for leisure or domestic activities.
- Disadvantages are :-
  - Short Fridays may increase absenteeism &/or lead to Friday working being abandoned.
  - Other groups may want to join the scheme which may not suit the organisation.

ANNUAL HOURS CONCEPT

- Work schedules are altered on a weekly, monthly or seasonal pattern according to business requirements.
- Requires careful & lengthy preparation to implement it.
- Requires tight control & an effective time-keeping system.
- Suited to organisations with readily identifiable 'cycles' throughout the year.
- Offers improved productivity & versatility; lowers overtime costs.

- Alternatively (working on a roster basis) the organisation opens 5 days for work but employees work only 4 days / week.

COMPRESSED WORKING WEEK

Time is re-organised such that employee works fewer than 5 standard days / week but the same basic number of hours, eg.
4½ day week (½ day Friday);
4 day week (less Monday or Friday);
9 or 9½ day fortnight; 6 day fortnight.

FLEXIBLE WEEKLY HOURS

Well suited to out-door workers tied to daylight working. Also recreational & staff.
Additionally, staggered dayworking rotas increase use of expensive capital equipment.

FLEXIBLE DAILY & WEEKLY HOURS

Separately, or in combination, a more cost-effective match of input man-hours with output goods/services is reached.

- Employer's benefits
- Employees' benefits

Potential benefits are:

- Increased productivity & flexibility.
- Reduced overtime working.
- Reduced overheads resulting from shorter working hours.
- More accurately predicted labour costs.
- Less need for temporary or part-time workers or sub-contracting.
- May be self-financing.

Potential employee benefits for this & other 'flexible' schemes are:

- Increased basic rates to compensate for loss of overtime.
- Shorter working hours.
- Stable incomes & greater job security.
- Better benefits commensurate with single-status staff terms & conditions of service as-is given to 'core' workers

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NEW EMPLOYMENT STRATEGIES 1 (of 2)

* WHY THE NEED FOR NEW STRATEGIES ?
* TYPES OF WORKFORCE
* TYPES OF FLEXIBILITY

WHY NEW STRATEGIES ?

- Recession &/or financial restraints pressure organisations to seek productivity improvements
  - Often by reducing workforces through voluntary or enforced redundancy.
  - By some other organisational means making best use of the remaining employee's time
- Changing markets demands more flexibility from the organisation.
- A growing reluctance by organisations to commit themselves to full-time permanent staff
  - Even with the prospect of potential economic recovery.
  - Staying 'leaner' with lower levels of full-time permanent staff.
  - Using new work patterns, or alternative staff to cope with peak demands or expansion.
- Pressure for shorter basic hours which would raise unit labour costs
  - 'Shorter hours' solved by more flexible working practices.
- High (external) unemployment meant employees considered alternative working patterns to retain their jobs.
- Unemployed people were prepared to take on marginal work.

TYPES OF WORKFORCE

- Core
  - Full-time, permanent status.
  - Likely to be a more skilled, versatile, flexible & adaptable workforce.
  - They will enjoy good career & promotion prospects.
  - They have a high degree of job security
  - High cost reward packages.
- Peripheral
  - The PERIPHERAL workforce comprises :
    - self-employed workers,
    - temporary & part-time staff,
    - sub-contractors,
    - agency temporaries,
    - other full-time employees, less skilled or with skills readily available on the labour market,
    - public subsidy trainees,
    - job sharers,
    - short-term contracts.
    - etc.

TYPES OF FLEXIBILITY

- Functional flexibility
  - Employees, with appropriate training or re-training, can be redeployed within the 'core' staff of the organisation.
- Numerical flexibility
  - The organisation increases/decreases employee numbers quickly by the employment of subcontractors, part-time or temporary staff.
- Financial flexibility
  - Uses payment systems which emphasise 'rate for the job'; rewards performance or skill; less need for overtime & higher rate payments.

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NEW EMPLOYMENT STRATEGIES 2 (of 2)

* FACTORS INFLUENCING INTRODUCTION OF NEW PRACTICES
* REDUCING WORKING HOURS

FACTORS INFLUENCING

- Recession (see paper 1)
- Reduced working week
- Introduction of New Technology
- New employee perspectives
- Other influences

Leading to the .....
- Removal of restrictive practices
- Redistribution of working time to match hours available & patterns of demand.
- Measures to further reduce overtime working.

Leading to .....
- Pressure to maximise the use of expensive new plant.
- Opportunities to computerise the monitoring & clocking of more complex working patterns.
- Less arduous work now allowing longer (upto 12 hour) shifts in some industries.
- Home- & tele-working using electronic apparatus.

- Existing structures / systems / practices may hinder changes.
- Attitudes of the organisation / the unions / the employees may oppose / encourage new work concepts.
- The organisation's objectives for the exercise.
- The type of workers involved
- The type of industry involved

eg. young/old ; skilled/unskilled; etc.

eg. service / manufacturing / public sector / distribution / etc.

REDUCING WORKING HOURS

Organisations reducing working hours usually require 'payback' of sorts. Possibly through :-

- New shift working
- Reducing abolishing overtime
- Use of sub-contractors
- Using temporary workers
- Using part-timers or job sharing
- Home- or tele-working

- In continuous process industries, 4-crew may become 5-crew working without extra cost or staff. Staff have more 'usable' time-off.

- Basic pay rates rise considerably BUT employees take time off in lieu of overtime pay. Employees 'bank' extra hours for future 'use'.
- No automatic cover for working short-crewed.
- Sub contractors & temporary workers at standard rates are used to increase staffing.

NEW PERSPECTIVES
- Manual workers want a more secure guarantee of earnings.
- Desire for time off in usable chunks for leisure & domestic purposes.
- More employees (mainly women) want less than f-t. employment (or job sharing).
- More persons seeking self-employment, subcontracting their services.

- For sickness & holiday cover.
- To provide employment, training & work experience for young people.
- To get possibly higher productivity since they work shorter hours.
- Because it suits many employees to work this way.

- SUBCONTRACTOR'S' rates are usually competitive & lower than in-house rates.
- Greater efficiency due to absence of restrictive practices.
- Savings come from management, administration & back-up costs.
- Employees often offer to provide services as independent sub-contractors.

- Temporary workers on short-term contracts with the same basic rates but without benefits of full-time workers.
- To cover for holidays, sickness, absence & temporary peaks in activity.
- A more flexible alternative to full-time employees.

11.05

α Issue 1

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SUBCONTRACTING

* WHY SUBCONTRACTING ?
* POTENTIAL ADVANTAGES
* POTENTIAL DISADVANTAGES

WHY SUBCONTRACTING

- To concentrate corporate resources on core, firm-specific activities
- To reduce costs generally & supplementing services in particular
- To increase flexibility
- To improve productivity
- To reduce economic risk
- To enhance job security for 'core' employees.

SUBCONTRACTING substitutes employment contracts OF service for commercial contracts FOR services for peripheral activities or services. Independent contractors take on jobs formerly carried out by employees.

- Organisation concentrates on doing only what it knows & does well. Buys in expertise when it is needed.
- Reduces the headcount on the payroll.
- Buys-in services through competitive tender.
- Subs. are paid for the 'job well done' irrespective of time taken; urgency or whether premium rates have been paid; etc.

EXAMPLES :- Security; catering; cleaning; maintenance; transport; etc.

- Capital no longer tied up in plant & machinery which may be under-utilised when demand turns down.

POTENTIAL ADVANTAGES OF SUBCONTRACTING

- Out to competitive tender, subcontractors have more positive attitudes.
- Firm gets benefit of higher productivity from core staff on core activities
- Seasonal fluctuations, etc. are economically covered.
- Fewer disputes, stoppages, restrictive practices, etc.
- Savings on recruitment & training of staff.
- Saving on costs of absenteeism.
- Substantial savings on associated employment costs

- Pensions; employers' insurance contributions; holiday & sick pay; administration costs; etc.

- New contracts OF service may give substantial pay increases in return for flexible working practices; avoiding redundancies; zero overtime; etc. BUT establishing the right of management to use subcontracted services when deemed necessary.

FLEXIBILITY To cover peaks in production or activity by buying-in expertise or extra capacity when required.

PRODUCTIVITY Facilities are geared to normal, regular demand levels. Flexible working schedules for 'core' staff ensure better utilisation of plant.

POTENTIAL DISADVANTAGES OF SUBCONTRACTING

- Legal status of subcontractors vis-a-vis the organisation sometimes uncertain
- Quality control & related considerations
- Who now trains in the skills (formerly undertaken by the organisation).
- Industrial relations implications

- EXAMPLE Health & Safety requirements of subcontractors on organisation's premises.
- Many organisations will supervise quality arrangements & control the activities of subcontractors.
- They can stipulate quality levels of inputs from subcontractors. Necessary if subcontractor's work is incorporated with the organisation's 'image'.
- Could lead ultimately to certain skill shortages.
- New arrangements may weaken T.U.'s in the workplace.

Issue 1

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OUTPLACEMENT CONSULTANTS IN CAREER MANAGEMENT

- ✳ WHY CAREER MANAGEMENT ?
- ✳ WHEN DO YOU NEED HELP ?
- ✳ USING OUTPLACEMENT CONSULTANTS
- ✳ WHY USE CONSULTANTS ?

WHY CAREER MANAGEMENT ?

An evolving theme of executive employment is :-

- The expectation of 3 or 4 job changes as the norm in one's career
- YES, to good salaries & opportunities but NOT life employment.
- Training & professional career guidance from the employer

→ - Individuals will value the opportunity of regularly reviewing their career.

Corporate concern is a facet of image protection through provision of outplacement services & better severance packages.
Indicates .... concern & acceptance of their responsibilities.
Avoids ..... bad P.R & bitterness.

WHEN TO HELP ?

When there is a perceived need ....

- To improve the effectiveness & satisfaction of directors/managers.
- To assist individuals to make an appropriate career move & to manage that change
- To help individuals communicate more effectively within their org'n.
- When management believes progress is being frustrated by an individual's performance or attitude.
- When projected redeployment, redundancy or early retirement is causing management concern.
- When management sees itself unable to satisfy an individual's ambitions

Examples :- a transfer within this (or to another) company ; promotion or a new role

Individuals have increased ability to achieve a desired change through :

- careful planning,
- deliberate action, or
- controlled self adjustment.

WHY USE OUTPLACEMENT CONSULTANTS ?

- To build the individual's communicating skills
- To overcome emotional impact of career conflict or change.
- To appraise the situation & identify new objectives
- To find a new & satisfying appointment.

NEW OBJECTIVES

- In line with your desired career progression.

COMMUNICATING SKILLS

- Internal negotiating skills.
- Recognising & handling internal politics.
- Cross-functional relationships.
- Influencing superiors.
- Motivating subordinates.

USING OUTPLACEMENT CONSULTANTS

- Objective 1 - individuals return to the company with a realistic proposition for change to enable them to perform effectively in their current role.
- Objective 2 - individuals take more control of their career following objective & confidential counselling.

→ O.C.s offer individuals unthreatened, secure & confidential opportunities to :

- speak the unspeakable,
- voice the unthinkable,
- discuss ideas, ambitions, & frustrations,
- accept professional guidance & support.

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EXECUTIVE SEARCH (or 'HEADHUNTING')

* WHAT IS 'EXECUTIVE SEARCH'
* WHY 'HEADHUNT' ?
* ADVANTAGES OF HEADHUNTING
* COSTS OF EXECUTIVE SEARCH

WHAT IS IT ? Done properly :-
- A cost-effective adjunct or alternative to 'selection' for filling middle & senior mgt. posts.
- A means to avoid expensive mis-matching of executive, job & company.

- Most large executive search organisations are generalist in nature operating across industry & commerce.
- Others are entirely specialist operating in clearly defined areas.

WHY HEADHUNT ?
- To produce a shortlist of candidates representing the best available in the market place.
- To recruit to a very specific brief with the objective of 'adding value' to the organisation by adding this special talent or expertise.

ADVANTAGES OF HEADHUNTING
- Uses a 'fine instrument' for selection, capable of responding to specific needs.
- Guarantees low profile effectiveness & complete confidentiality.
- Reaches candidates who might not....
  - read advertisements
  - have thought of moving (until now).
- Possibly more cost effective than normal advertising & recruiting procedures.
- Will continue until it gives satisfaction.

COSTS
- A minimum fee, usually a percentage of the appointee's salary package (c.30%)
- Any expenses incurred by candidates & consultants. Possibly advertising costs if any are involved.
- 3-stage charging.....
  1/3 on assignment of job,
  1/3 on submitting shortlist,
  1/3 on appointment of the candidate.

* PREPARING FOR EXECUTIVE SEARCHERS
* POINTS TO CONSIDER

PREPARING FOR E.S.
- Give them plenty of time.
- Check what information you are prepared to divulge
- Check the consultant's brief

Time to understand thoroughly the style & nature of your org'n & match candidate & client. To visit all company locations & understand the exact specification of the job to be filled & the culture & environment in in which candidate will work. (7-8 weeks)

- Who will read the brief ?
- Do not withhold relevant info^n from the consultant.

- They will prepare a comprehensive summary of the background to the search & a candidate specification.

POINTS TO CONSIDER
- Only if searchers understand your business culture & nature can they accurately match the candidate.
- They are your advocate & interface with potential candidates carrying the company's image.
- Check out their claims, references & who will actually undertake the search
- A good E.S. can help advise the company concerning the final offer & job package.
- If you cannot trust them implicitly - don't hire them.

- You must feel comfortable with him/her & relate to him/her.
- Their track record must be demonstrably good.

∝ ISSUE 1

11.08

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CO-COUNSELLING (1 of 2)

* WHAT IS CO-COUNSELLING ?
* WHY IS IT USEFUL ?
* RESULTS OF SUSTAINED CATHARSIS

WHAT IS IT ?

- A method of personal development through mutual support for persons of all ages.
- A tool for living for those who are already managing their lives acceptably by conventional standards.
- IT IS NOT for persons too emotionally distressed to attend to a fellow on a reciprocal basis.

WHY IS IT USEFUL ? (to individuals)

- All persons are differentially stressed
- These stresses may be enabling or disabling in the way they affect one
- Co-counselling has a cathartic value

– By virtue of their human condition.
– By the presence of other stressed humans.
– By the apparent meaningless of many phenomena.
– By tensions between physical survival & personal development.

CATHARTIC VALUE

– Releases distress from the mind-body.
– Possibly manifested by tears, trembling, loud sound, storming movement, laughter, screaming, etc.
– Individuals will respond differently.

SUSTAINED CATHARSIS

Can result possibly in :-

- Spontaneous insight
- Break up of endemic or chronic patterns of rigid behaviours or attitudes
- Liberation of 'frozen' human needs & capacities
- Joyful affirmation of felt strengths & creativity

– INSIGHT into past traumas or events (grief, fear, anger, shame, embarassment, etc.) enabling a re-evaluation to take place.

– When the tensions that sustain them are released they may also release correlated physical (often muscular) tensions.

– Unblocks human potential.

Examples

– Intelligence can function.
– Choice is released.
– Love is freed from childhood fixations.
– Other undeveloped capabilities are realised.

ENABLING

– Promoting personal development & cultural achievement.

DISABLING

– Personal behaviour becomes distorted as behaviour patterns are repeatedly triggered & acted out.
– Individuals interfere with others possibly unawarely, though possibly deliberately or maliciously.

EUSTRESS - beneficial stress. DISTRESS - often harmful stress.

11.09 ∝ Issue 1

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CO-COUNSELLING (2 of 2)

* HOW IS IT ORGANISED ?
* ROLE OF THE CLIENT
* ROLE OF THE COUNSELLOR

ORGANISED

- As a 2-way process between two persons (usually peers)
- Client & counsellor are tutored in appropriate skills

– Each takes a turn as counsellor & counselled (client).
– Sessions would last possibly 1 hour in each role.

– Counselling, listening & interactive skills are developed on basic training workshops.

ROLE OF THE CLIENT

Co-counselling is client directed as well as client centred.

- Client works on him/herself
- Client takes charge of the 'discharge' process
- Client works on past, recent, present relationships & future

– Client works with the aware, supportive attention of the counsellor.
– Client is free, in principle, to reject intervention by the counsellor.

– Client works with the accessible & available distress.

Includes :
– Childhood experiences.
– Personal & professional relationships.
– Political & institutional tensions.

Possibly through :
– Evocative descriptions of early events.
– Role play, acting out the distress.
– Contradiction, of the negative self-image.
– Other techniques

To accommodate the 4 primary ways of managing catharsis:
- Active imagination.
- Passive imagination.
- Active body work.
- Passive body work.

ROLE OF THE COUNSELLOR

- As a sympathetic listener & supportive attender.
- Counsellor may be asked for, & offer, non-verbal attention only.
- Counsellor may offer intervention
- Counsellor is not to interpret, analyse, criticise or advise on any problems raised.
- When skilled, more intensive interactions (based on cues evident in the client's discourse) may be offered.

In the form of practical suggestions on what the client might say or do.....
- if the client falters or loses the thread of the cathartic process.
- within a contract indicated by the client.

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A MANAGEMENT APPROACH TO SUBSTANCE-ABUSE (1 of 2)

* WHY IS IT NECESSARY ?
* ASPECTS OF SUBSTANCE ABUSE IN EMPLOYEES
* MANAGEMENT SUBSTANCE ABUSE PROGRAMMES

WHY IS IT NECESSARY ?

- It is a significant problem in the U.S.A., are we different in this country ?
- To reduce financial losses.
- Because it is really happening.

WHAT SUBSTANCES ?

Depressants (heroin; valium; alcohol; morphine; etc.)
Stimulants (benzedine; cocaine; etc.)
Hallucinogens (L.S.D.; marijuana; hashish; etc.)
Most research has centred on alcohol abuse. Drug abuse has still to be fully researched.

- Current documented research suggests upto 10% of employees have impaired job performance due just to alcohol. (Figures for drug abuse are not yet so clear.)

Reduces :
- Cost of sickness & accident benefits.
- Lost production whilst employee is away from the workplace.
- Scrap & reworking losses whilst at the workplace.

ASPECTS OF S-ABUSE

- Impaired job performance due to poor co-ordination; lateness; faulty judgement; sickness & absenteeism; accidents; etc.
- Unpredictable behaviour.

- Sickness, absenteeism & accident rates are often 3× higher than for normal un-affected employees.

SUBSTANCE ABUSE PROGRAMMES

Feature :-
- Policy
- Identification
- Intervention
- Diagnosis & treatment

POLICY

- The organisation must have a policy.
- Agreed with the unions.
- Substance abuse seen as an illness capable of treatment
- Policy applies to all employees equally.

FORMULATED, COMMUNICATED & SUPPORTED

Supervisors would have guidelines to follow when approaching the problem with subordinates.

What constitutes a realistic treatment programme ?

(See 'A management approach' 2)

IDENTIFICATION

The actions of persons suffering substance abuse problems vary, depending on :
- their frame of mind & emotional state,
- whether surroundings are familiar or strange,
- whether the friends are new or old,
- the quality & quantity of the substance used,
- the method of administering the substance,
- whether combined with other drugs,
- the physical size & condition of the person,

Variances in behaviour patterns are best spotted by managers/supervisors noting deteriorating work performance due to 'unacceptable behaviour patterns'.

- ► Alcohol & drug abuse programmes have positive measurable effects on employee behaviour.
- ► It is proving cost effective & good policy to rehabilitate employees in the workplace so they retain their employment & rights.
- ► Good union/management co-operation has spin-offs in other labour relations situations.
- ► Company retains skills of experienced employees & their goodwill following rehabilitation.

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A MANAGEMENT APPROACH TO SUBSTANCE ABUSE (2 of 2)

- ✳ MANAGEMENT'S INTERVENTION
- ✳ PREPARING FOR THE INTERVIEW(S)
- ✳ HOLDING THE INTERVIEW

INTERVENTION

Following the identification of a potential alcoholic or drug user, the stages of intervention are:-

- Confrontation of the problem of poor work performance.
- Careful interviewing, leading to...
- An offer of professional counselling or medical help.
- Agreeing rehabilitation procedures.
- Continued vigilance following rehabilitation.

DIAGNOSIS ?

- Supervisors are not qualified to diagnose drug or alcohol problems.
- Supervisors curtail intervention to what they understand and can observe, namely.....

POOR WORK PERFORMANCE

PREPARING / STRUCTURING THE INTERVIEW(S)

- Document past transgressions.
- Identify acceptable levels of performance
- Establish what behavioural objectives need to be agreed with the employee
- Plan to achieve agreement in writing during the interview
- Ensure the employee understands what is required of him/her.

- Was the employee aware of these beforehand? (See Job Description) In writing?
- May relate to Job Performance; timekeeping; absenteeism; etc.
- Must specify a date for these goals to be attained

- Some coercion may be necessary.
- Threat of job loss is usually enough.
- Possibly coerced into treatment too.

HOLDING THE INTERVIEW

- Who will do it?
- Prepare for anything
- Focus on work performance
- Reiterate good past performance.
- Offer help

- Manager will need to be very strong & always firmly in control.

Employee may:

- Attempt to involve or blame others.
- Involve the manager in their personal problems.
- Offer promises & excuses galore.
- Exhibit anger - due to 'persecution'.
- Breakdown & weep.
- etc.

- Professional counselling &/or medical help which hopefully leads to treatment
- If employee refuses help or treatment?

It is often more realistic to use outside rehabilitation sources.

If attempts to correct poor performance fail after a reasonable time, the alternative is disciplinary processes leading to dismissal for.....

INADEQUATE JOB PERFORMANCE

NOT for drug or alcohol abuse.

REMAIN VIGILANT!

Short term conformance does not necessarily signal complete recovery. The key to these procedures lies in DOCUMENTATION.

∝ Issue 1

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SUBSTANCE ABUSE - IMPAIRED PERFORMANCE

* CAUSES OF IMPAIRED PERFORMANCE
* LOOKING FOR SYMPTOMS

IMPAIRED PERFORMANCE may be due to:-
- Inadequate training for the job.
- Inadequate direction or support.
- Inadequate tools or facilities.
- Personal financial or medical problems.
- Substance abuse → The last resort to be considered if other avenues have been pursued & discarded.

LOOKING FOR SYMPTOMS

The following symptoms may imply the employee's performance inadequacies are the result of substance abuse.
- Accident rates rise
- Work patterns disrupted
- Increased absenteeism
- Physical deterioration
- Personality changes

N.B. These symptoms may be caused by factors other than substance abuse.

ACCIDENT INCIDENCE
- Records must show a higher-than-average incidence of accidents in the workplace.
- Also actions that put colleagues at risk eg. disregarding safety regulations & taking needless risks.

WORK PATTERNS
- Inconsistent work quality & productivity.
- Difficulty with complex tasks.
- Lapses of concentration & memory.

INCREASED ABSENTEEISM
- Records must show a higher-than-average incidence of absenteeism.
- Frequent & unexplained disappearances from the work area.

PHYSICAL DETERIORATION
- Lacking energy & enthusiasm for work.
- Exhaustion, lack of stamina.
- Unsteady walk or shaky hands.
- Vacant expression &/or deteriorating speech.

PERSONALITY CHANGES
- Depression; anxiety; irritability &/or mood swings.
- Over-reacts to criticism becoming argumentative or withdrawn.
- Withdraws from usual social contacts in the workplace.

* MANAGER'S/SUPERVISOR'S RESPONSIBILITIES

- For your subordinates' performance & safety at work.
- To remain watchful for substance abuse without arousing hysteria or offence.
- Carefully to confront subordinates if certain criteria are met:
  - Has the suspected problem interfered with duties/performance?
  - Is it detrimental to the health of colleagues or the interests of the org'n.?
  - If the inference is 'YES', consider confronting the employee but not without the knowledge & guidance of your superiors or professional advisers.

N.B. The key to confrontation is adequate record-keeping.

Issue 1

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MANAGING FOR WELLNESS (1 of 2)

* WHAT IS 'WELLNESS' ?
* EFFECTS OF STRESS ON WELLNESS
* HOW DO MANAGERS INFLUENCE SUBORDINATES ?

'WELLNESS' implies being physically & mentally fit. It manifests itself in :-
- being mentally alert,
- improved endurance & stamina,
- the absence of harmful stress indicators,
- enjoying your work & the feeling of belonging,
- better interpersonal interactions.

Managers influence their subordinates & associates more than they realise. Others look to them for direction; feedback; praise; guidance; acceptance; reassurance; etc. Absence of these can set up tensions leading to stressful situations.

EFFECTS OF STRESS
- Stress relates to physical tensions, it is a force which elicits a response.
- Visualising a stressful situation can trigger a mental response
- Mental stimulation sends continuous messages to your organs & creates continuous stress

Example :- anticipating negative influences from your boss or colleagues.

– A downward spiral from 'wellness' to 'sickness'; gloom & disinterest in your job.

MANAGERS' INFLUENCE
Can be seen as :-
- Positive
- Negative

POSITIVE INFLUENCES – in techniques
- to boost productivity
- to promote their good health

– Consider your activities to motivate them & your leadership style.

– Monitor your present managerial practices/habits.
– Can you institute a 'health' programme ?
– Re-appraise the corporate culture/climate in which you work & interact.

NEGATIVE INFLUENCES or **STRESS-CAUSING ACTIVITIES**
- Too much job stimulation → – Leads to 'burn-out' & exhaustion.
- Too little job stimulation → – Leads to 'rust-out' & frustration.
- Lowering their self esteem → – Possibly done subconsciously through :-
  - excessive criticism,
  - lack of praise,
  - promotion passovers,
  - poor work assignments,
  - no credit given when due.
- Setting up WIN : LOSE situations →
  - Authority conflicts are more frequent & bitter.
  - Atmosphere becomes competitive, hostile & distrusting.
  - Diverts time & energy toward side issues.
  - 'Losers' are discouraged & become uncooperative & defensive.
  - Anger & disenchantment flourishes
  - Non-aggressive persons 'opt out'.
  - Creativity is reduced.
  - Fewer people make more of the decisions.
- Being unpredictable
  - Implies lack of control over oneself & circumstances.
  - Causes uncertainty in subordinates who don't know where they stand.

α Issue 1

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MANAGING FOR WELLNESS (2 of 2)

* CREATING A HEALTHY ENVIRONMENT
* MAINTAINING A HEALTHY ENVIRONMENT

A HEALTHY ENVIRONMENT

Is characterised as being:-

- Supportive
- Unpolluted

A 'SUPPORTIVE' ENVIRONMENT

- Has an aura of trust and mutual respect.
- Helps people focus on their jobs.
- Considers / implements / supports individual & staff health programmes.
- Recognises the importance of corporate culture
- Uses techniques to boost productivity which also improves health
  - Gives rewards.
  - Gives constructive feedback.
  - Gives recognition & praise.
  - Permits participation.
  - Keeps people informed.
  - Pushes for performance but only 'so far'.
  - Acknowledges their / your 'stress comfort zones'.
- Corporate culture creates an environment which can have beneficial or detrimental effects on 'wellness' according to circumstances.

AN 'UNPOLLUTED' ENVIRONMENT

- Free of excess noise, fumes, smoke, etc.
- Safe to move around in (planned layouts).
- Free from hazards arising from other's behaviours
  - Not prone to incidents through drug-, alcohol- or any substance-abuse.
  - Not influenced by stress-induced activities of peers or subordinates.

MAINTAINING A HEALTHY ENVIRONMENT

- Assume folk want to do a good job & perform well
  - McGregor - Theory 'Y'
  - Maslow - striving for 'self esteem'. (Research studies show links between health & self esteem.)
- Convert stress pressure into energy & direct it to get results.
- Recognise the importance of a healthy environment & let maintaining it become part of your managerial style
  - Manager / subordinate relationships are a major determinant of employee health.

Death-dealing stress G. Engel 1977

Some recognised causes were :-

- a sense of failure;
- defeat;
- disappointment,
- humiliation,
- loss of self-esteem.

MANAGERIAL RESPONSIBILITIES & HEALTH

- ✳ HOW ARE MANAGERS RESPONSIBLE ?
- ✳ FACTORS GOVERNING THE ENVIRONMENT
- ✳ MANAGING THE WORKING ENVIRONMENT
- ✳ HEALTH & NORMS

MANAGERS ! Confront issues pertaining to health eg smoking; safety at work; various substance abuses; etc.

HOW ?
- Subordinates' performance is linked with their health & 'wellness'.
- The working environment influences 'wellness'.
- Managers have responsibility for performance & the working environment

– Physical & mental fitness is an important aspect of job performance.

ENVIRONMENTAL FACTORS
May be classed as :-
- Uncontrollable
- Controllable

UNCONTROLLABLE FACTORS
- Market forces & trends.
- Behaviour & strength of the competitors.
- Governmental legislation & the national economic climate

CONTROLLABLE FACTORS
- How the company appears to the outside world - through its public relations activities.
- How employees perceive the company & how it treats them → – A good environment does not guarantee 'wellness' but it does prevent 'illness'.
- How things are done around here.

MANAGING THE ENVIRONMENT
- Recognise the increasing trend towards smoke-free environments.
- Provide a supportive environment
- Value people
- Handle subordinates with consideration
- Recognise & act over employees' impaired performance caused by various substance abuses.

(See Outlines 11.11 & 11.12)

– However, to show preference to non-smoking appointees when recruiting is not legally discriminatory. → – 'Supportive environments' do not make people work harder but they do reduce demotivation.

– People's differences are not necessarily shortcomings.

– Builds 2-way trust & respect.

CONSIDERATION
- Treat their time as valuably as your own.
- Listen to them, at meetings & elsewhere.
- Discipline them discreetly & tactfully when it is called for.
- Promote from within where possible.
- Identify career paths for subordinates.
- Solve problems, don't apportion blame.
- Recognise that 85% of your needs are their needs too.

HEALTH & NORMS
- Identify positive & negative norms of behaviour
- Accentuate positive norms.
- Reshape negative norms to produce positive goals to work toward

– Those directed toward hard work are powerful influences. (Productivity Norms)

– Health norms are directed toward improving the cultural environment and individual wellbeing

EXAMPLE - No Smoking in the workplace

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LEARNING ABOUT THE ORGANISATION

* ON JOINING THE ORGANISATION
* INDUCTION OF NEW EMPLOYEES
* INFLUENCING AN INDIVIDUAL'S BEHAVIOUR

ON JOINING

- An 'exchange relationship is involved
  - Employees give up some personal freedoms as the price of membership, & use their skills for the organisation.
  - In exchange they receive remuneration, security, status, etc.
- Employees must adapt to the 'corporate culture'

THE PROCESS OF SOCIALISATION

They need to know what is expected of them .....

- what is good/adequate work performance,
- acceptable dress & behaviour,
- attitude to subordinates; peers; superiors; customers; suppliers; etc.
- the rules of everyday social interactions,
- group norms & codes, etc.

CORPORATE CULTURE 'The way we do things round here.'

Individuals are conditioned from birth by their upbringing & culture to respond (albeit subconsciously) to stimuli which has lead to the development of their present attitudes & related behaviours.

INDUCTION OF EMPLOYEES

- The learning of skills & knowledge to carry out the job is a formal task
- Preconceived behaviour & ideas now need to be tailored to the organisation's standards - an informal process.

Probably the role of a trainer or more senior employee (supervisor).

- Dividing the task into segments with appropriate performance standards for each.
- Motivating the trainee to learn by stressing the advantages of acquiring extra/new skills.
- Giving clear, frequent & appropriate feedback on performance.
- Recognising, encouraging & rewarding good performance enhances motivation to learn.

INFLUENCING BEHAVIOUR

'Behaviourist approaches'..... lead to conditioned responses

BEHAVIOURIST APPROACHES

- Rewards are positive reinforcement.
- Punishments are negative reinforcement.

Learning is the result of experience with appropriate feedback.

PAVLOVIAN (RESPONDENT) CONDITIONING

- changes our behaviour (or learning) as the result of further conditioning.

SKINNERIAN CONDITIONING (OPERANT)

- shapes behaviour by selective reinforcement of the desired bits of behaviour through getting some material reward.

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NEW WORK ETHICS

- ✳ QUALITY OF WORKING LIFE PROGRAMMES
- ✳ THE JAPANESE EXPERIENCE
- ✳ RISING EDUCATION LEVELS

Q.W.L. PROGRAMMES hold that 'every person has the right to a job that satisfies their personal needs....' combining
- Adequate & fair compensation.
- Safe & healthy working conditions.
- Development & growth of human capabilities.
- Growth & security.
- Constitutionalism.
- Social integration of people.
- Protection of total life space.
- Social relevance of work.

→ Common management methods to achieve these Q.W.L. ends are :
- flexible work schedules,
- improvements in health & safety,
- job design,
- participative management,
- employee counselling,
- autonomous work groups,
- career management.

JAPANESE EXPERIENCE focusses on human resources more than financial or physical resources for long-run success →
- Job rotation & slow promotion → promotion based on seniority.
- A complex appraisal system → performance is only 1 criterion.
- Emphasises work groups → more autonomy.
- Open communication → vertically & laterally.
- Consultative decision-making → not necessarily consensual.
- Management's concern for the employee → 'walking the floor' to meet them.

RISING EDUCATION LEVELS bring problems like :-
- Less well educated manual workers feel less secure → (See below)- due to A.I., robotics & automation.
- Many in jobs for which they are overqualified .....&
- Seeking Q.W.L. programmes to reduce industrial monotony & boredom.

- ✳ THE KNOWLEDGE WORKERS
- ✳ THE NEW SCENE

- The 'Post Industrial Society' sees growth in service industries → - Manufacturing is of lesser importance.
- Automation & robotics substitutes machinery for labour → - Increased use of Artificial (A.I.) Intelligence
- The importance of leisure & growth in leisure industries → - Whether as a RIGHT, or to be EARNED.

THE KNOWLEDGE WORKERS whose strengths lie in putting their knowledge to work. They .....
- Find achievement a motivator
- Note the high demand for their knowledge
- Need to have their achievements recognised.
- Need challenging tasks with opportunities for growth and personal satisfaction.

→ - When dis-satisfied, they look elsewhere for work &/or challenges.

11.18

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NEW MANAGERS, NEW IDEAS

S.B.U. = Strategic Business Unit.

✳ THE 'LIBERATED' MANAGER

✳ NEW MANAGERIAL STEREOTYPES

THE 'LIBERATED' MANAGER

- Sees the job as an equitable contract between 2 parties
- Seeks a new style of org'n to utilise their trained abilities → Concerned with Q.W.L. programmes.
- Gets a new job, masters it & moves on → Believes strength travels better than weakness.
- Seeks the right 'fit' or leaves → Manager 'fires' the organisation.
- Puts loyalty to career first using companies as 'training schools' → Think & function over short time frames.
- Questions decisions & is not afraid to confront power.
- Places a high value on their lives away from the job.
- Their ranks are being swelled by female managers → Faced by several types of bias:
  - culture bias (job stereotyping),
  - management bias towards male managers,
  - overt/covert discrimination,
  - female bias, by other females,
  - 'systems' bias against professional women.

NEW MANAGERIAL STEREOTYPES

are guided by new corporate social ethics. Most executives are a mix of :-

- Craftsman
- Jungle fighter
- Company man
- Gamesman

CRAFTSMAN

- has traditional values
- Concern for work ethic, people, quality & thrift.
- Enjoys building something.

GAMESMAN

- Sees business life & his/her career (options & possibilities) as a game.
- Takes calculated risks.
- Fascinated by new techniques & methods.
- Competes for fame; glory; to be a 'winner.'
- Fears to be labelled 'a loser.'

COMPANY MAN

- Part of the protective org'n.
- Creative ones sustain co-operation & stimulation.
- Weak ones seek security more than success.
- Lack daring to lead competitive & innovative organisations.

JUNGLE FIGHTER

- Lusts for power.
- Believes 'winners' may destroy 'losers'.
- Peers become 'enemies' or 'accomplices'.
- Subordinates are objects to be used.

✳ DISMISSAL PROCEDURES & OUTPLACEMENT

✳ EXECUTIVE AGE & CORPORATE PERFORMANCE

DISMISSAL & OUTPLACEMENT

(Dismissal – involuntary separation from one's job.)

- Manager's job security must rest upon the ability & experience of individuals. → Can result for a variety of reasons.
- View firings as new opportunities → Retain a strong belief in oneself.
- Outplacement firms help fired employees → First, adjust to unemployment. Second, find new employment.
- Outplacers offer advice on the mechanics of firing.
- Outplacement results are outstandingly successful.

- Data reveals no connection between management age & corporate performance
  - → Mature S.B.U.s performed better with mature managers.
  - → Newer S.B.U.s achieved more favourable results with younger managers.
- Facing retirement issues :-
  - retirement shock → Personal adjustment problems in going from full-time work to full-time leisure.
  - phased retirement → Usefully provides additional leisure time as retirement approaches eg. longer vacations.

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NEW ORGANISATIONS, NEW CONCEPTS

- ✳ THEORY 'Z'
- ✳ NEW CONCEPTS
- ✳ INDUSTRIAL DEMOCRACY

THEORY 'Z'

Studies of American (Type 'A') & Japanese (Type 'J') organisations were developed to the ideal Theory 'Z' type of company.

DEFINITION :- Theory 'Z' org'ns maintain formal & explicit control mechanisms & believe in formal planning; M.b.O.; & sophisticated information & accounting systems.

Suggests .....
- longer-term employment;
- encourages employees & managers to think and function over longer time frames;
- cross training & job rotation;
- participative decision-making;
- improved Q.W.L. for employees.

NEW CONCEPTS

- Quality circles; groups; programmes
- Management by Objectives
- Flexitime
- Job Sharing
- Flexiplace
- Developing corporate consciences.
- Growing relationships between government & private sector org'ns.

QUALITY CIRCLES etc. leading to greater employee participation in quality programmes resulted in improved product quality; reduced costs & more effective management.

M. by OBJECTIVES Employees feel greater involvement with their work when jointly developing specific goals & objectives.

FLEXIPLACE Employees work at home instead of in an office.
OK - providing modern technology will permit it.
- opens job opportunities to a new range of persons eg. single parents; the handicapped; etc.

JOB SHARING (or twinning) where two workers divide one full-time job. The overall benefits outweigh any disadvantages.

INDUSTRIAL DEMOCRACY

A range of participative formats now exists to provide employees with varying degrees of involvement in the operation & achievement of their organisation.

- Co-determination : workers on boards
- Works councils
- Shop floor participation
- Financial participation
- Collective bargaining.

Example : profit sharing with unions / workers.

CO-DETERMINATION
Generally conceived / perceived as a communications structure rather than a worker 'control' device.

WORKS COUNCILS
Now mandatory in all European countries to varying degrees & strengths, they exert most influence over factory level management; decision-making; performance; & productivity levels.

SHOP FLOOR PARTICIPATION
Consists of various notions / restructuring processes designed to provide workers with greater participation in decisions affecting day-to-day performance at work.

✳ MULTI-NATIONAL CORPORATIONS

Face many environmental differences eg.
- Political differences.
- Cultural differences.
- Economic differences.

Adaptability is the key to effective international mgt.

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PEOPLE & P.O.M.

* MANAGERIAL PHILOSOPHIES AT WORK
* TRADITIONAL APPROACHES
* WAYS FORWARD ?

MANAGERIAL PHILOSOPHIES

- Control through specialists
- Control to nth degree
- Control from a distance
- Specialisation of labour

.... who develop procedures, systems & activities within the area of their specialisms – often separate people from P.O.M.

The reality of people adds to the size, complexity & variable nature of P.O.M. To abdicate this responsibility for people management means other staff functions become prime movers in key issues.

PROBLEMS WITH USING SPECIALISTS

- Developments within the specialism outpace line manager's involvement.
- Tasks best performed in the line are now performed elsewhere.
- Responsibilities for some aspects of the task are inadequately clarified.

- Job redesigning & investment in process is de-skilling labour but increasing productivity.
- Analytical detachment from the reality of business may mean the maintenance & development of control procedures is 'too little, too late.' Procedures fall into disrepair.
- Used indiscriminately, sometimes specialists' theory & the requirements of reality diverge.

TRADITIONAL APPROACHES to improving the quality of working life include :-

- JOB ENLARGEMENT – combining several tasks into one task
  - Simply widens the job span; the job is not necessarily more interesting.
- JOB ENRICHMENT – by adding back discretion & autonomy in planning & your own work/tasks
  - Can contribute to job satisfaction, eg. workers provide for their own quality control.
- JOB ROTATION – moves people between jobs both formally & informally
  - Gives greater potential worker flexibility; decreases dependence on one individual; may expose less able workers to the stress of work changes.
- CHANGING WORK SCHEDULES – more flexible working practices
  - EXAMPLES :- flexitime ; 4-day working ; etc.
- PARTICIPATION – in decisions & developments within the business

- Recognises the valuable contribution workers can make on job-related issues. Also industrial democracy places workers' representatives in all decision-making bodies in the organisation.

WAYS FORWARD ?

- Tactical issues of the future ?

(The real test in management is completing the task. Centralised planning & control may suit the corporate view using procedures, systems & specialists, but it kills creativity & entrepreneurism in the organisation's employees.)

TACTICAL ISSUES

- Work will continue to be de-skilled & simplified. Work (for many) is synonymous with manual tasks. Future job interest will be through non-manual aspects of work.
- Job Descriptions improve control at a particular moment but reduce flexibility, so define objectives to be achieved by groups, sections or departments to encourage a flexible response
  - Include self direction & self-monitoring.
- Engineering orderliness (segregated tasks & straight lines) may give way to configurations which avoid unnecessary breakdown & separation of tasks & linear layouts.
- By utilising specialists, ownership of problems & their solutions, controls, procedures & systems may be seen in departmental rather than corporate terms.

A complete corporate philosophy needs to be agreed, introduced & developed so each facet forms part of the whole philosophy.

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INCREASING WORK REWARDS

* MANAGER'S ROLE
* JOB DESIGN
* MANAGERIAL IMPLICATION OF JOB DESIGN
* GOAL SETTING
* WORK SCHEDULING

MANAGER'S ROLE as agent of the organisation (s)he is responsible for allocating extrinsic rewards e.g. pay; promotion; praise; etc.

JOB DESIGN - 'the deliberate, purposeful planning of the job including any or all of its structural or social aspects'
Its features are :-
- Job Simplification
- Job Enlargement
- Job Enrichment

INTRINSIC REWARDS are received by individuals resulting from task performance, an integral part of the work & employee has high degree of control over them. (Some are self awarded.)
EXTRINSIC REWARDS are externally controlled & result from task accomplishment.

A 'job' is one or more 'tasks' performed by an individual. Intrinsic (task) motivation may come from the pleasant experience of accomplishing a task
⇒ Job Satisfaction

Possible alternatives are :-
- Flexible hours,
- Job sharing,
- Compressed work week,

showing a common concern for making time requirements more compatible with individual needs & non-work activities.

GOAL SETTING - the process of developing, negotiating & formalising objectives an employee is responsible for.
Potential outcomes :-
- Difficult goals can lead to higher performance.
- Specific goals similarly.
- Goals motivate performance when they are accepted.

Job Enrichment by altering both horizontal & vertical elements of the job eg.
- Added planning & evaluating duties increase Job Satis^n by increasing responsibility, autonomy & opportunity.
- Adding core job characteristics leads to increasing motivation by increased:
  - meaningfulness of work,
  - responsibility for work outcomes,
  - knowledge of results.

Job Enlargement by increasing task variety horizontally; adding activities & processes; off setting the effects of Job Simplification e.g. job rotation.

Job Simplification may entail the reduction of a job to its component parts & their re-assembly into an optimally efficient work process.
Emphasises :-
- Mechanical pacing to monitor the speed of production.
- Repetitive work processes so that individuals replicate same tasks.
- Concentration on only a fraction of the product.
- Predetermination of tools and techniques to be used.
- Limited social interaction.
- Low skill requirements needing minimal training.

JOB DESIGN Impact of core job dimensions on personal work & outcomes is modified by employee growth-need strength & other factors :-
- Where growth-need is strong
- By age of employees
- By level of education
- By levels of self-assurance
- Their current state of job satisfaction
- Socio-technical features

- There is greater need for meaningfulness & other psychological states.
- Younger workers accept change easier than older workers who also prefer repetitive jobs
- Higher educational attainers prefer higher challenges & more autonomy.
- Relates to their confidence to tackle more exciting tasks.
- Some workers are happy with boring, monotonous jobs.
- Autonomous self-regulating work groups help meet social needs as well as introducing technological innovation to their work.

∝ Issue 1

Job Redesign often has positive outcomes on performance but still will leave employees less happy & productive.

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REMUNERATION & PERFORMANCE-RELATED REWARDS

- ✳ THE CURRENT TREND
- ✳ THE TOTAL REMUNERATION PACKAGE
- ✳ INCENTIVES & PERFORMANCE-RELATED REWARDS

CURRENT TRENDS are :-
- For personal & corporate performance to have an increasing effect upon levels of remuneration paid to a company's employees.
- For centralised union pay negotiating machinery to give way to more flexible local arrangements in both public & private sectors.

Basic pay will be closely affected by the application of job evaluation & performance appraisal programmes which increases the complexity of pay & remuneration systems

THE TOTAL PACKAGE
Contains elements of :-
- Compensation
- Security, reducing concern about the unknown
- Performance-related rewards

COMPENSATION
The exchange relationship which rewards employees for their skills, time & experience.

SECURITY .....
- of employment especially in times of illness,
- of retirement benefits,
- of insurance for death-in-service or long-term disability,
- of private medical treatment,
- etc.

REWARDS for achieving objectives beyond normal requirements by an individual, the team, or the company as a whole.

INCENTIVES & P-R REWARDS
- Bonus Schemes
- Profit Sharing
- Commission
- Employee share ownership

BONUS SCHEMES
- Without direct relationship to performance create good feelings but tend to become expected ('rights') even when times are hard.
- Discretionary bonus schemes - for unusual or special achievements to individuals or teams, improves performance if rewards can be calculated against known criteria. May use qualitative or quantitative criteria as long as monitoring & assessing is possible for a defined period.

EMPLOYEE SHARE OWNERSHIP
Engenders a closer identity of intent between employee & shareholders. It is a further dimension to the objectives attributed to performance-related bonus schemes
eg. - profit linked share schemes,
- savings-related share option schemes,
- share option schemes.

COMMISSION
Unlike basic pay costs & guaranteed benefits which are prior commitments, commission is paid only if it is earned.
- Employees personal objectives are closely associated with those of the business as a whole.
- FINE, in high volume sales situations.
- POOR, in high cost, low volume sales situations with long negotiating periods & large technical back-up requirements.

PROFIT SHARING
- The money is determined in relation to company performance as a whole.
- No one formula fits all organisations' requirements which is easily explained & understood.
- Criteria for sharing may be complicated according to length of service, basic pay rates, etc.

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REMUNERATION (for hourly-paid employees).

- ✳ BASIC PAYMENTS
- ✳ OVERTIME PAYMENTS
- ✳ BONUS PAYMENTS
- ✳ SPECIAL PAY COMPONENTS

BASIC PAYMENTS – the basic reward for doing the job
- Job Evaluation, is the methodical way to reach equitable basic pay relationships.
- Basic pay must reflect changes in technology & responsibility.

Pay & payment issues have a marked effect on behaviour, attitudes & motivation & consequently on P.O.M. performance Pay needs to be fair & be seen to be fair

It is also the basic measure employees use to judge their work & reward.
- The ABSOLUTE value (how much?)
- The RELATIVE value (how does it compare with others?)

- JOB EVALUATION compares the relative worth of one job against another - subject to the conditions prevailing - by analytic & non-analytic methods.
- 5 factors are normally used.....
  - mental requirements,
  - physical requirements,
  - responsibility,
  - skill requirements, &
  - working conditions.

OVERTIME PAYMENTS for hours worked in excess of contracted hours.
- The overtime premium is treated by accountants as a production overhead being 'capacity related'.

BONUS PAYMENTS are additional performance related payments to encourage people to increase their willingness to work
- Incentives induce this situation & leaves the employee in some sort of control of their earning capacity
- P.O.M. responsibility

Embraces increases in:
- the rate of working,
- the time spent working at the task,
- their skill & effectiveness in doing the task.

P.O.M. RESPONSIBILITY
- To set objectives for the scheme.
- To determine what measure of influence they seek to exert.
- To enable people to achieve the level of job performance they are capable of achieving & duly qualify for a bonus.
- To maintain & develop the system to meet set objectives.

SPECIAL PAYMENTS
Usual ones are :-
- DIRTY MONEY, to compensate for working in 'worse than normal' conditions.
- DANGER MONEY, for working in specially dangerous conditions.
- SHIFT PAYMENTS, for the disturbance of starting & finishing at odd (possibly anti-social) hours.
- MERIT AWARDS, for special (relatively small & infrequent) work features

- Unless used carefully, everyone will expect/want one & the scheme falls into disrepute.

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11.24

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GIVING RECOGNITION

* WHY GIVE RECOGNITION ?
* WHEN TO GIVE RECOGNITION / FEEDBACK
* GOVERNING RECOGNITION
* WHAT SORT OF RECOGNITION ?

WHY GIVE RECOGNITION ?
Recognition contributes to the 'wellness' of employees.
- People perform better with feedback
- Closes the 'commitment gap'
- Can encourage trust, creativity etc. & build a better corporate climate.

MANAGERS !! Motivation works for others as it works for you. Recognition affects individuals differently.

WHEN ?
- Daily - to motivate and inspire.
- Periodically - less of a motivator of their day-to-day activities.

TYPES OF FEEDBACK Feedback is not always 'praise'. Meaningful feedback is :
- immediate;
- specific, describes results;
- something the receiver can act upon and change;
- of benefit to the receiver and not the giver;
- more often positive than negative;
- verifiable, "do you mean what I hear you say ?"

Try a 4:1 ratio of praise : criticism

GIVING RECOGNITION
- Decide what you want to reward
- Give recognition reward to consistent performers as well as for 1-off events
- Structure the culture to achieve it

'COMMITMENT GAP' is the differential between .....
A - minimal working to keep my job, &
B - how hard I could work if motivated

Recognition can nudge average performers towards high performers where marginal improvements can produce bigger results.

- Accentuate successes.
- Don't over-emphasise failures
- Causes downward spiral to gloom & a 'losing' attitude.

- Praise must be specific & sincere.
- It is quite acceptable to praise your boss as well as your subordinates.
- Recognise & encourage for their level of achievement & on their standards, not on yours.

- AVOID rating & classifying people as above- or below-standard. It only creates 'winners' & 'losers' when individual's circumstances may make it difficult to succeed.
- RATHER manage for performance by setting P.E.P.'s (Outlines 1.41-1.45) & contract for performance. This creates 'winners' & 'potential winners'.

WHAT SORT OF RECOGNITION ?
- Financial or promotion or both
- Pat on the back & a word of congratulations.
- Reprimand
- Doing nothing - a neutral response

- For long-term consistent success as well as 1-off major successes.
- Cheaper & easier to administer.
- Always available.
- Always appreciated.

- Erodes motivation, reduces performance & causes resentment since it implies no notice is being taken.
- Positive thoughts only count when voiced/expressed.

- Properly & sensitively delivered, it can improve performance & motivation without antagonising employees.

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RECOGNITION is a 'behaviour shaper'. Since motivation comes from within a person & not from mgt., recognition drives motivation. Positive responses feed behaviour.

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KNOWLEDGE AS A MOTIVATOR

IN MANY SITUATIONS, PEOPLE WILL PERFORM BETTER IF THEY HAVE KNOWLEDGE

- KNOWLEDGE of how to get started on a task
- KNOWLEDGE of a change which will affect them
- KNOWLEDGE of HOW changes will affect them
- KNOWLEDGE of the 'WHY' of it, or what's in it for me as well as for the organisation ?

HOW TO START ?

- Give precise directions stating who will do what; how; when & to what standard.
- Check for understanding & agreement & the ability to achieve/complete the task.
- How will they recognise the successful completion of the task ?

THE 'WHY'

- Personal cost: benefit analyses are inevitable by affected individuals.
- The new situation may be reward enough.

EXPLAIN

- How their effort will contribute to the whole & the completion of the change.

KNOWLEDGE OF A CHANGE

- One can not have too much knowledge – "Tell me more".
- Knowledge is vital to prevent rumour and minimise stress.
- Explain the goals & objectives

Objectives should be:

- Stretching & challenging, yet realistic.
- Quantifiable.
- Agreed by all involved in their achievement.
- Have an operational feedback system to trace progress to the goal. (More knowledge of results & performance.)

[Keep records before, during & after the change to evaluate success or failure.]

IN THE ABSENCE OF KNOWLEDGE

People will.....

- Start to personalise the events.
- Consider all manner of negative possibilities first.
- Raise emotional issues.

So

- Build commitment to the event/change

Don't pretend this .....wont happen,

- so give re-assurances.....&
- explain why they should want to be involved.

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IMPROVING EMPLOYEE PARTICIPATION

* VALUE OF INCREASING PARTICIPATION
* WAYS TO INCREASING EMPLOYEE PARTICIPATION

VALUE OF PARTICIPATION

- It makes positive assumptions about people (McGregor - Theory Y)
- People AND managers can solve problems
- Makes instituting change easier
- Improves the working environment & gives opportunities to promote employee health.

→ Greater participation means greater awareness of subordinates' or employees' views, problems, skills, etc.

→ – Involve employees before instituting the change.
– Identify and involve 'natural' leaders.
– Enrol & convince 'opinion' leaders.
– Invoke group support & peer pressure.
– Illustrate individual & group benefits as incentives.

INCREASING EMPLOYEE PARTICIPATION

- Be more approachable
- Get more facts from your employees
- Support their risk taking
- Change decision-making procedures
- Be creative; be flexible; don't always 'go by the book'
- Encourage a sense of belonging
- Increase their knowledge

(See Outline 11.26)

BE APPROACHABLE

Build into your management 'style':
– good listening skills
– when receiving ideas..... identify 3 good points before listing any bad points.
– 'contracting'

CONTRACTING

· Agree work goals, objectives and incentives.

Listening skills

· Use open questions & keyword repetition.
· Control your words, tones & body language.
· Use 'encouraging' phrases

BELONGING

– Increases job satisfaction for subordinates.
– Improves feelings of 'wellness'.

DECISION MAKING

– Autocratic decision-making is quick, decisive, ... and resented!
– Democratic decision-making is slower but builds commitment.

BE FLEXIBLE

– Try to surround yourself with subordinates who complement your management style.
– A good match leads to employee 'wellness.'

SUPPORT RISK TAKING

– Don't penalise unsuccessful risk taking but let them be responsible.
– Recognise & reward successful risk taking.
– Build up trust & respect for their abilities.
(Improves employee's feelings of 'wellness'.)

GET FACTS FROM EMPLOYEES

– What do they really want?
– How do you know that?
– How did you find out?
– Is it a widespread want?
NOW RESPOND, even though its not quite what you wanted.
– If rejecting it, give valid reasons.

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MANAGING PEOPLE - GROUP VALUES

* GROUP NORMS
* WHY EMPLOYEES CONFORM TO NORMS
* GROUP ROLES

GROUP NORMS (See Outline 7.28)
- As a group develops, so do its NORMS.
- Conformity (to norms) is a requirement of sustained group membership

(If non-conformity existed, managers could not predict a group's behaviour patterns & channel the group's efforts.)

- Conformity is re-inforced & rewarded.
- Non-conformity punished with sanctions eg they isolate or ignore the deviant.

WHY THEY CONFORM
- Situational factors
- Intra-group relationships
- Authoritarians & the less intelligent will conform more

- Conformity increases with group size upto 4.
- Conformity is increased where the group displays unanimity.

Relates to group & peer pressure.....
- How much a member identifies with the group.
- How the group succeeds in achieving goals.

- Conversely, the more intelligent & non-authoritarians are less likely to conform.

GROUP ROLES

Within the group, members have :-
- Expected roles
- Perceived roles - what they believe to be their role.
- Enacted roles - what they actually do.

- Frustration & conflict arises from incongruence of 'enacted' & 'expected' roles. Result :- they may conform to the 'expected' role or leave the group.

* STATUS IN GROUPS

STATUS - a measure of 'worth' conferred on a person (or group) by some social or by the organisation. Derived from :-
- Reward Power
- Receiving Power
- Through personal investment
- Seniority

Individuals & groups are motivated by the possibility of achieving high status & gaining esteem.

REWARD POWER
People (or groups) who can confer valued rewards are given high status by other persons or groups.

RECEIVING POWER
People (or groups) who receive valued rewards are accorded high status by other persons.

SENIORITY
Sometimes confers status, priviliges or rewards.

PERSONAL INVESTMENT
Those who exert great efforts or take great risks to achieve their goals are accorded high status by other persons.

Papers
Outline 7.28 - Group norms
Outline 7.26 - Group behaviour

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ATTRIBUTES OF GROUPS 1

* The Process of Socialisation
* Types of Groups
* The Group as an Open System
* Developing Power & Authority

SOCIALISATION People join groups to define their performance function, status & role with regard to their peers.
Stages in socialisation are:-
- Anticipation
- Initiation
- Assimilation
- Change (or retirement)

- Especially those whose judgement they value.

ANTICIPATION
- A pre-learning process to breakdown & replace previous reference gps.
- Thereby alters previous roles & status.

INITIATION
- Initiate's role assimilation begins.
- Informal structures, processes & values noted.
- Fears now of failure & possible rejection.

CHANGE
- Career (& opportunities) level off, or
- New careers develop into new lifestyles.

ASSIMILATION
- Value system develops further.

DEVELOPING POWER & AUTHORITY
Major activities are:-
- Becoming organised and oriented
- Resolving relationships with each other

RESOLVING
- Passes subphases of delusion, disillusion & acceptance of other members.
- Relationships develop around task needs & unique individual qualifications
- Moves into 'mature' phase with frequent & realistic communication

ORGANISING
- Passes subphases of orientation, conflict & cohesion.
- Characterised by uncertainty of purpose; members' roles; their commitment & the gp. structure.
- Testing the leader's authority, power & decisiveness.
- Working out differences & uncertainty.

TYPES OF GROUPS
- Work group
- Informal group

- **WORK GROUP** – created by the formal authority of the organisation to transform work inputs into product outputs.
- Hierarchically, superiors in one group may be subordinates in other groups.
- Usually superior-subordinate relationships are clearcut.

INFORMAL GROUPS – spontaneously emerge without being formally specified.
- Form across & within formally designated units.
- Exist to satisfy the personal needs of their members.

OPEN SYSTEM

GROUP PROCESS —(transforms)→ RESOURCE INPUTS —(into)→ GROUP OUTPUTS

Comprise:-
- Organisational setting (resources; structure; goals; rewards; etc.)
- Nature of task (whether simple or complex)
- Individual attributes (demographic characteristics & skills)
- Membership characteristics (interpersonal compatibilities, etc)

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ATTRIBUTES OF GROUPS 2

* CHARACTERISTICS OF MATURE GROUPS
* GROUP VALUES (& NORMS)
* GROUP ROLES
* STATUS IN GROUPS

IN MATURE GROUPS
- Individual differences are accepted → - Whether good or bad.
- Decisions follow rational discussions → - Dissent is encouraged.
- Future conflict is over real substantive (task-related) issues → - Not emotional issues of group structure or process.
- Members are aware of gp. processes & own involvement

STATUS IN GROUPS
A measure of worth conferred on a person (or position) by some social group. May arise from :-
- Reward power
- Receiving rewards
- Through personal investment
- Through seniority.

-High status often accorded those who put in great effort or take great risks.

-If the rewards are valued by the group class, society or culture.

- High status accorded to those who can confer valued rewards.

GROUP ROLES
- Expected role.
- Perceived role
- Enacted role

Frustration & conflict result from incongruence of roles.

ENACTED - what that person actually does.

PERCEIVED - what a person believes he/she should be doing.

GROUP VALUES
- Conformity to group norms is rewarded
- Non conformity is punished.

GROUP NORMS are :
- Standards shared by group members.
- Important to the group members.

- CONFORMITY is a requirement of sustained gp. membership.
- Without conformity, managers could not predict the group's behaviour patterns.....
- Group effort cannot be channelled.

* GROUP COHESIVENESS
* DEFICIENCIES OF GROUP DECISION MAKING PROCESSES

GROUP COHESIVENESS Forces which act on members to remain within the group include :-
- Charisma of the leader.
- Good group reputation for achieving.
- Group & individual goals congruent.
- Group small enough for individuals to be noted.
- Group members are mutually supportive in personal growth & development.

- Can waste time.
- Dilutes responsibility
- 'Group think' arises
- Costly delays

- On matters not essentially the group's concern.

- Cohesive groups negatively influence critical thinking in support of cohesiveness.

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THE NATURE OF MARKETING

* WHAT IS MARKETING ?
* MANAGEMENT FUNCTIONS
* THE MARKETING MIX

WHAT IS MARKETING ?

It is both :-

- a MANAGEMENT FUNCTION, &
- a BUSINESS PHILOSOPHY

The Management Function is to clearly identify customer wants & needs & match them to corporate skills & capabilities; developing, implementing & controlling plans to meet customer requirements.

- It involves forecasting future demand & target setting while ensuring that corporate resources are available to meet them.

The Business Philosophy recognises :

- customer wants & needs & generates products services to satisfy them better than your competitors.....
- facilitating exchanges between customer & company which will enhance value for both parties

- In commercial transactions the seller receives financial benefit.
- In non-commercial transactions the parties benefit in other tangible ways.

MANAGEMENT FUNCTIONS

- Analyse & define the market through objective research
- Planning
- Controlling

Controlling to ensure the planned programme is being effectively & efficiently operated.

Planning strategically with long-term strategies & short-term tactics to create the competitive edge to give you a differential advantage over competitors

MARKETING MIX

Comprises the market variables/tools the manager has to ensure the products/services match the customers' needs & wants :-

- The Product/service offered
- Promotion
- Price
- Place

Place

- Which distribution channels to use ?
- How to transport the product/service

Price

'Cost plus' is not always best to maximise benefits to both parties.

- What will the market bear ?
- Consider also credits; discounts; allowances, payment periods, etc.

Promotion

Bringing the product to the attention of the market encompasses sales promotions ; P.R. ; advertising ; personal selling ; etc. - PROMOTIONAL MIX

The Product / Service comprises :

- the core product/service (the central benefit or service that the customer is buying)
- the tangible product / service. (quality ; styling ; brandname ; packaging ; product features ; etc.)
- the augmented product / service of added features or benefits. (delivery ; warranty ; after-sales ; etc)

N.B. increasing augmentation may assist differentiation between products.

Define the market

- Who are the customers ?
- Why do they buy the product / service ?
- When do they buy the product / service ?
- Where do they buy (or consume) it ?
- How are their needs & wants changing ?
- Who are the competitors ?
- Quantitatively assess its size, value, etc.
- Qualitatively assess customers' motivation....

* MARKETING PRINCIPLES

- Markets consist of segments so standardised products are vulnerable.
- Customers buy benefits NOT products.
- Long-term objectives are best served through customer satisfaction.
- Markets are dynamic & products may have a limited life.

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STRATEGIC MARKET PLANNING

* DEVELOPING MARKETING STRATEGY
* BUSINESS PORTFOLIO PLANNING

- Begins with a SWOT analysis of the organisation's capabilities & the market in which it operates.
- It comprises :-
  - defining the business mission
  - assessing strategic alternatives
  - deciding the strategic focus
  - implementing the strategy

Strengths Weaknesses; Opportunities; Threats. S.W.O.T. Analysis

DEFINING THE BUSINESS MISSION

- What business are we in - reflects:
  - what markets / customer groups?
  - what customer needs are being satisfied? (function)
  - what technology satisfies their needs?
- What business do we want to be in. (Thoroughly analyses the options & how its markets are changing.)
  - what distinctive competence does this organisation have?
  - which core skills are exploitable in the market place?
  - assess its image & market presence,
  - examine its distribution network or after sales service.

Employee & management skills.

BUSINESS PORTFOLIO PLANNING

Relates to conglomerate businesses with multiple products or services.

- First define Strategic Business Units (S.B.U.'s)
- Analyse the current position of each S.B.U.
- Examine inter-relationships
- Project the future of each S.B.U.
- Project the future portfolio

- To avoid imbalance between future cash use & generation.

FUTURE OF S.B.U.'s should be projected on the basis of the strategy selected for the S.B.U. & the expected market & competitor reaction.

EXAMINE INTERRELATIONSHIPS to seek a balance between cash 'users' and 'generators' in the future to spread risk & to reduce vulnerability.

ANALYSE S.B.U. POSITIONS

- Are they current or potential earners?
- Do they provide raw materials or product outlets to other S.B.U.'s?
- How well is it achieving now?
- State their..... business mission; customer & competitor analysis; target markets; differential advantage in those markets.

DEFINE S.B.U.'s asking:

- How is the total business divided?
- How are current objectives & targets set?
- How is performance currently evaluated?

IMPLEMENTING THE STRATEGY

- Assemble the correct marketing mix of product, promotion, price & distribution to bring marketing plan to fruition.
- Establish a marketing control system (with data supply) to monitor progress towards set goals.
- Contingency planning requires some forecasting & an estimate of likely competition & scenario planning.
- How to evaluate it will relate to the objectives which were set.

DECIDING THE STRATEGIC FOCUS

- What are the Key Factors to Success? (KFS) in this industry? (Where a given amount of effort obtains > effect.)
- Decide long- & short-term objectives such that the sum of s-t objectives equals l-t objectives.
- Core strategy states how the org^{n}. will achieve its objectives taking account of target markets & differential advantages over competitors.

ASSESSING STRATEGIC ALTERNATIVES

- How is the market segmented?
- Where could we focus activities?
- How to optimise opportunities?
- Where is the best fit between the market requirements & our capabilities?
- How is the organisation coping with competitive activity?

- Search for 'strategic windows'.
- Search for untapped / undertapped opportunities in the market.

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UNDERSTANDING MARKETING ASSETS

* ASSESSING GENERAL STRENGTHS & WEAKNESSES
* ITEMISING MARKETING ASSETS

ITEMISING MKTG. ASSETS :- those properties which can be used to advertise in the market place.
- Customer-based assets
- Distribution-based assets
- Internal assets

INTERNAL ASSETS include :
- Cost advantages through better capacity utilisation; economies of scale; etc.
- Info^n & marketing research systems which permits better decision making.
- Technical superiority permitting improved product quality.
- Production knowhow.

DISTRIBUTION-BASED ASSETS include :
- Physical distribution networks.
- Key account marketing through specific chains.
- Unique or innovative ways of reaching the target market.

CUSTOMER-BASED ASSETS as perceived by the customer/potential customer & are strong assets where reputation is converted into a favourable brand image.
- Companies with poor corporate image may acquire individual brand names as assets prior to launching new products.
- Image is slowly built but can be quickly destroyed by mistakes.
- Market leaders are often perceived to be better in some way.
- Best built on unique/superior products & services.

ASSESSING S. & W. a 4-step process requiring :-
- Auditing of resources
- Drawing comparison with competitors
- Assessing the balance of activities within the org'n.
- Identifying key issues

KEY ISSUES are :
- Strengths & weaknesses relative to the competition.
- What do we do best, or uniquely well, which will develop our competitive advantage?

ASSESSING THE BALANCE :
- Between cash use & generation; today's & tomorrow's breadwinners; levels of vulnerability; etc.
- Ability to respond flexibly to uncertainty - sometimes enhanced by R. & D. programmes.

Objective :- to identify an organisation's marketing assets, reputation, image etc. & put them to work for the organ'n to create competitive advantage

'Resources' comprise :
PHYSICAL RESOURCES eg. plant & machinery.
SYSTEMS & STRUCTURES, especially info^n & planning systems; & structures within the organisation eg. matrix mgt. organisation; product mgt. systems; etc.
PEOPLE & THEIR SKILLS especially technical; R. & D.; production & quality control; managerial skills & experience.
FINANCIAL STANDING & ability to raise finance internally & from outside ventures.
MKTG. PRACTICES, RESOURCES & THEIR UTILISATION
Estimations of resource utilisation help identify under-utilisation & scope for development.

COMPARISONS Knowledge alone is not enough, comparisons must be made. (**CARE**: they can sometimes be misleading unless done by independent assessors or consultants.)

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Assets built up in the market place are less prone to attack than are low prices & imitable technologies and products.

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DEVELOPING COMPETITIVE ADVANTAGE

* GENERIC STRATEGIES
* RISKS OF GENERIC STRATEGIES
* ACHIEVING GENERIC STRATEGIES

Objectives :-
- To build a strong, defensible, sustainable position in the market by differentiating the company's offerings.
- To achieve this at the lowest possible cost.

GENERIC STRATEGIES The three strategies are :-
- Cost leadership
- Product/service differentiation
- Focussing

COST LEADERSHIP - a low-cost strategy, needs high market share & favourable raw material access. Suited to commodity market with little differentiation between brands offered. Attained through :
- Scale economies.
- Tight cost & o-head control.
- Cost minimisation in R.&D., advertising, servicing, etc. leading to lower pricing.

DIFFERENTIATION - a market-based strategy through creating :
- Something UNIQUE industry-wide.
- Reasons for customers to buy this rather than competitor's products.

FOCUSSING on one or more segments of the market through :
- serving specialised segments only.
- concentrating on specific geographic regions only.

RISKS
- Cost leadership may not be sustainable
- Differentiation may quickly be eroded
- Focussing advantages could be imitated and may lead to myopia

Due to :
- Competitor imitation.
- Technological change.
- High competitor differentiation.
- Minimal spending on R.&D., product improvement, etc. leaving your product vulnerable.

Due to :
- Competitor imitation.
- Differentiation becoming less important.
- Cost outweighs customers' perceived value. (Risks reduced by constant competitor & customer monitoring.)

FOCUSSING
- Segments may become less attractive as the market develops & other strategies succeed.
- Other firms may re-segment or sub-segment your market.
- Competitor imitation.

ACHIEVING GENERIC STRATEGIES
- In differentiation
- In cost leadership

(See 11.35)

COST LEADERSHIP - the most difficult to maintain, through :
- Scale economies (doing things more efficiently, or differently, in volume; creating purchasing leverage with suppliers, etc.)
- Through learning & experience (can be bought-in, hired or enhanced by training).
- Capacity utilisation giving better R.O.I.
- Timing (gaining cost advantages of a 'first mover'; or exploiting technology to leapfrog first movers).
- Location (affecting costs of distribution, assembly, energy costs, etc.)
- Linkages, within the firm, producing & marketing a better product (by Q.C., M.Research, etc.)
- Integration (to make or buy components; to contract out delivery & service ? etc.)
- Policy choices affecting technology, design & differentiation.

'THE HEART OF STRATEGIC THINKING'

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ACHIEVING PRODUCT DIFFERENTIATION

* PURPOSE OF PRODUCT DIFFERENTIATION
* AREAS FOR P.D. LEVERAGE
* FACTORS TO CONSIDER

Objective :-
To differentiate your product / service from its competitors.

PURPOSE OF P.D. - it seeks to increase the perceived value of the product/service on offer. It covers the :-
- Core product or benefit
- Tangible product
- Augmented product

CORE PRODUCT/ BENEFIT
- Find a different way to satisfy the same basic need or want.

TANGIBLE PRODUCT
- By improving performance & appearance features.

AUGMENTED PRODUCT
- By affecting service, delivery, installation, warranty, credit availability.... for the consumer.

FACTORS TO CONSIDER IN P.D.
- Differentiation creates added value for the customer.
- The cost of the P.D. relative to the customer's perceived value of the product/service.
- The speed or probability of competitors copying.
- The potential market size likely to be affected.
- The degree to which P.D. will exhibit marketing strengths & minimise weakness.

IDENTIFIED AREAS FOR P.D. LEVERAGE are :-
- Perceived value/quality by the customer
- Style / design
- Packaging
- Promotional differences
- Distribution differences
- Pricing differences

Concerns the durability, appearance & fitness-for-purpose of the product/service offered. (CARE :- it may differ from the manufacturer's perception.)

Concerns products with high emotional appeal eg. cosmetics; fashion; design.

PRICING only succeeds where the company enjoys a cost advantage, or barriers to prevent other firms competing at a lower price.

DISTRIBUTION - from using different outlets, networks or market coverage.

PROMOTION - uses different types of promotion, different intensities or different advertising messages.

Packaging serves to :
- Store the product & extend shelf-life.
- Protect the product in transit & prior to consumption to ensure consistent quality.
- Facilitate use of the product.
- Create an image through its visual impact; quality of design; illustration of uses; etc.
- Promote the product with eyecatching colour and shape.

- The greater the degree of differentiation, the more the scope for premium pricing.
- Differentiation should be pursued on multiple fronts to enhance P.D.
- Added value signals enhance perceived differences eg. image or reputation.

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UNDERSTANDING THE COMPETITIVE ENVIRONMENT

* THE COMPETITIVE (MICRO-) ENVIRONMENT

considers :-
- Competitor Analysis
- Potential Entrants
- Product Substitutes
- Strength of Suppliers
- Strength of Buyers

Definition :-
- The competitive (m) environment concerns the company, its competitors & potential competitors, its buyers & suppliers.
- The macro-environment concerns societal factors like demographic, economic, technical & political factors.

COMPETITOR ANALYSIS
- Who are our competitors now, & in the future ?
- What are their strategies & objectives (goals)?
- What are the competitors' strengths & weaknesses ?

→ Can you predict their likely reaction to your moves or to market changes ?

→ This determines their freedom to manoeuvre & react to your strategic initiatives.

POTENTIAL ENTRANTS are likely when :-
- Growth rates are possibly high.
- Potential margins are attractive.
- Barriers to entry are low.

Countered by restricting access to :
- Raw materials,
- Buyers,
- Channels of distribution,
- Erecting switching costs
- Having a highly differentiated product with perceived value to customers.

PRODUCT SUBSTITUTES
- If technical development is rapid, new sub. products are invented which confer core benefits better.
- Subs. with substantial differential advantages in price or added benefits quickly gain foothold.

Company must take an 'active role' to improve its own product to increase consumer satisfaction using the latest technology if necessary.

STRENGTH OF BUYERS
Balance of power lies with the buyers if :-
- Buyers are concentrated.
- They purchase large volumes.
- They exert strong influence over the ultimate consumer.
- Products are standard & lack differentiation.
- Substitute products available.

Countered by developing own brand name, reputation, image or 'other marketing asset.

STRENGTH OF SUPPLIERS
Balance of power lies with suppliers of raw materials if :-
- There are few suppliers.
- Supplies are restricted.
- Products are highly differentiated.
- Switching costs are high.
- Lack of substitutes available.

Countered by 'backward integration' - acquiring one or more of your key suppliers.

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THE BROADER (MACRO-)ENVIRONMENT

* ECONOMIC & POLITICAL CHANGES
* SOCIAL & CULTURAL CHANGES
* TECHNOLOGICAL CHANGES
* MARKETING CHANGES

E. & P. CHANGES Influenced us by
- Learning to live with low-growth markets.
- Increased international competition from developing countries.
- Third World raw material producers wield power over developed countries with implications for world trade.
- High structural unemployment

Increased emphasis on:
- shorter working hours,
- flexible working practices,
- creative use of leisure time.

SOCIAL & CULTURAL CHANGES in attitudes & values lead to increasing awareness & therefore:-
- Questioning the industrial profit motive as the main business objective.
- Changing expectations from work.
- Concern for the environment
- Concern for individual health.
- The 'consumerist' movement
- The consumer 'age profile' change.
- The affluent youth market.
- Increasing single-person households
- Growth in women in employment

- A factor in managing the 'company reputation'.
- Seeking value for money for the consumer.
- Changes in eating patterns & attendant food technology.
- People have generally better living standards & live longer.

MARKETING CHANGES leading to greater marketing orientation caused by :-
- Increased levels of competition - domestic & abroad.
- Many markets becoming 'global' markets.
- Distinct market segments becoming clearer
- Marketing for survival.

- Positioning strategies are increasingly important.

TECHNOLOGICAL CHANGES heralded by the micro-processor means :-
- Revolutionising data collection, processing & dissemination.
- Major changes in prod^{n} technology
- Shorter commercialisation times for new inventions
- New media pose new problems and opportunities for advertising.
- Electronic point-of-sale devices
- Managerial use of micro-computers

- Serves to increase the rate of technological change.
- Leads to shorter product life cycles & products becoming obsolete more quickly.
- Gives almost instantaneous feedback on sales, advertising effectiveness & new product test marketing.
- Increased interest in market modelling & decision support systems.

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CONSUMER MARKETS & BUYER BEHAVIOUR

* CULTURAL FACTORS
* SOCIAL FACTORS
* PSYCHOLOGICAL FACTORS
* PERSONALITY FACTORS

CULTURAL FACTORS pervade all behaviour & create dispositions to act. Comprising:-
- Learned responses, which ...
- Change with time
- Ethnic & religious sub-cultures
- Youth (or 'Pop') culture
- Social classes

– A set of values; attitudes; beliefs; held by members of a society.

SOCIAL FACTORS
- At the root of cultural patterns are primary family groupings
- 'Family life cycle'

– A useful instrument to identify best prospects for products & services.

– The small 'nuclear' family predominates in Western cultures. 'Extended' families more prevalent elsewhere.

– A useful indicator of pre-disposition to purchase. (Ref: A, B, C_1, C_2, D, E)

– Have large spending capacity.

– Marketers ignore these at their peril.

– As views are challenged & sub-cultures co-exist.

PERSONALITY FACTORS or 'traits' are also used to predict consumer behaviour. (See Social Classification)

PSYCHOLOGICAL FACTORS thought to influence consumer behaviour:-
- Motivations, stemming from needs & wants
- Perceptions, as individuals view & internally conceptualise a product or service.
- Attitudes & beliefs learned in up-bringing
- Dissonance Theory

– Marketers ask, 'Why do people buy?'

The components are :-
- Cognitive – (or knowledge) – about an object or service.
- Affective – ('feelings') – reflect likes/dislikes to object or service.
- Connative – the disposition to act.

– Post-purchase attitudes become more positive as purchasers re-assure themselves their their decision was right.

* BUYING DECISION PROCESS

Individuals may take 1 (or more) roles in the buying decision process.
- Initiators – first perceives a need to be filled.
- Influencers – carry weight in the final decision
- Deciders – make the decision to buy.
- The Buyer – may not be the decider.
- The User – who consumes the product or service.

– Could be a salesperson or opinion leaders.

STAGES IN THE PROCESS
- Problem recognition
- Information search
- Evaluation of alternatives
- The purchase decision
- Post-purchase behaviour

– The INITIATOR identifies the need.

– Seeks information to influence the buying decision.

– Brand images impact upon how alternatives are evaluated.

– Reducing dissonance.

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INDUSTRIAL & ORGANISATIONAL MARKETS 1

* NATURE OF INDUSTRIAL PRODUCTS SERVICES
* INDUSTRIAL & CONSUMER MARKETING DIFFERENCES

INDUSTRIAL PRODUCTS & SERVICES offer a wide variety of buying situations depending upon the subject matter :-

- Manufactured material & parts
- Raw materials
- Installations
- Accessory equipment
- Operating supplies & consumables
- Business services

– Component materials that will undergo further processing. Component parts requiring further change of form

· It is possible to differentiate parts to buyers to build-in switching costs.

MARKETING DIFFERENCES
Features which distinguish industrial markets & reflect on face-to-face dealings with buyers :-

- Fewer buyers – True for manufactured parts & capital items.
- but Larger buyers – Increased power for buyer to negotiate special terms.
- Geographical concentration of buyers – Important for services, or if proximity to raw materials matters but is generally becoming less important.
- Derived demand – Dictated by ultimate consumer so fluctuations have an impact on industrial sales & services.

RAW MATERIALS
- Are converted by purchaser into own products/services.
- Extractive industries sell undifferentiated natural products primarily on price eg; oil; minerals.
- Farm products – by manipulating raw materials (land, seed, etc.)

INSTALLATIONS
- Plant & machinery are infrequently purchased so involve complex buyer behaviour.

ACCESSORY EQUIPMENT
- Portable or light equipment, tools & office equipment aid production operations.
- For service industries, their quality & appearance impact on the company image.

- Inelastic demand – Links to end-user means demand is not immediately price elastic to buyers.
- Fluctuation demand
- Professional purchasing – Purchasers are usually skilled professionals working individually or teamed into decision-making units.
- Systems selling – Sells a package of product &/or service..... leading up to complete installations.
- Direct distribution – Often possible so reducing delivery lead times.
- Infeeding – Where companies supply their own needs the actual market is much reduced.

BUSINESS SERVICES which affect the final product or service include maintenance & repair, & professional services eg. legal.

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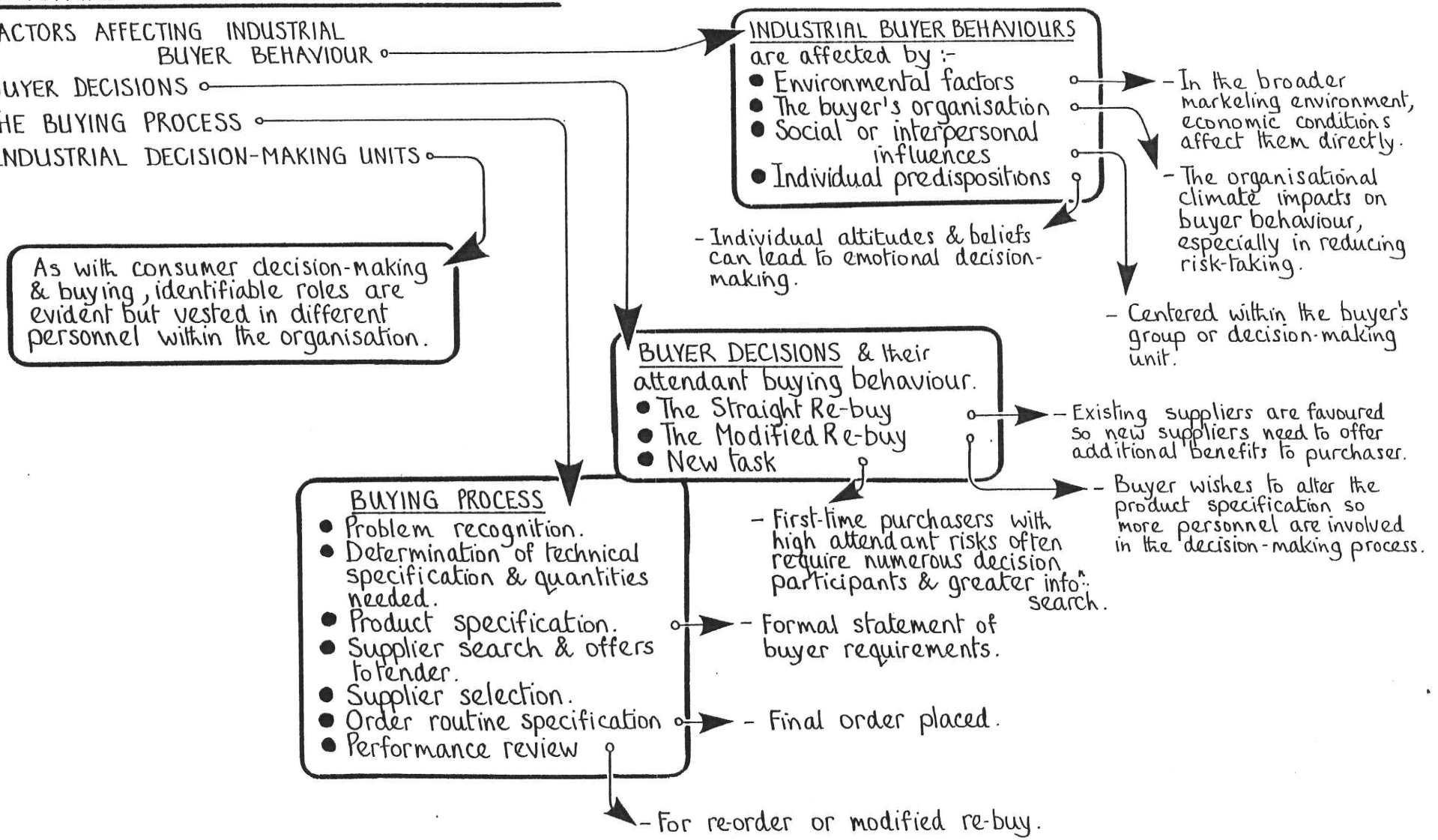
INDUSTRIAL & ORGANISATIONAL MARKETS 2

* FACTORS AFFECTING INDUSTRIAL BUYER BEHAVIOUR
* BUYER DECISIONS
* THE BUYING PROCESS
* INDUSTRIAL DECISION-MAKING UNITS



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SELECTING A COMMUNICATION STRATEGY

Many tutors, instructors, managers rely heavily on the spoken word or written word while disregarding alternatives for realising particular sets of objectives.

* WHEN IS THE SELECTION STRATEGY CRITICAL ?
* WHAT IS WRONG WITH PROSE ?
* STRATEGIES GUARANTEEING CORRECT INTERPRETATION
* STRATEGIES NOT GUARANTEEING CORRECT INTERPRETATION

STRATEGY IS CRITICAL when :-

- The information to be communicated is complex
- The consequences of misinterpretation are important.
- The omission of some instruction is vital

(Not critical for simple instructions, meetings, etc.)

- Rules; procedures; instructions; etc.
- Example - preflight cabin checks by airline pilots.
- Where personal interaction permits clarification of details.

PROBLEMS WITH PROSE

Written or spoken, continuous prose is complicated by :-

- The Motives, &
- The Assumptions ... of the communicators.

- **MOTIVES** ..... the desire to :
  - Simplify the message,
  - To convey 'sensible' messages,
  - To make conveying the message as pleasant &/or as painless as possible.
  - To be correct, exact, precise.

ASSUMPTIONS

- That inferences are always distinguishable from observations.
- That words are only used one way

The reader/listener makes decisions about interpretation rather than perceive there may be ambiguities.

GUARANTEE CORRECT INTERPRETATION Use :-

- Algorithms
- Decision Tables

- **ALGORITHMS** - systematic plans or flowcharts which reduce complex problem solving to a series of comparatively simple operations

Advantages - OK for procedural chains & speeds decision making.
- Can safely pass decision taking to lower levels within a hierarchy.

- **TABLES** can be used where multiple outcomes are possible to a situation & they steer decisions toward the correct outcome

Advantages
- Minimises errors due to oversight.
- Imposes a structure on multiple discrimination procedures.

INTERPRETATION NOT GUARANTEED CORRECT

Use :-

- Continuous prose
- Heuristics

- Choosing the right words for communicating complex instructions is usually very difficult.
- Where the communication can be simplified use ..... short, simple phrases/ sentences, avoid conjunctions, avoid negative sentences, (use active voice, avoid passive voice).

- Heuristic strategy involves 'trial & error' or 'discovery' methods. OK where the risk of incorrect interpretion is acceptable.

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Operating manuals; instructions; etc. are often produced by literate, articulate persons; to be read & interpreted by less articulate persons.

[ELABORATED CODE v. RESTRICTED CODE]

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COMMUNICATIONS

Tx = Transmitter Rx = Receiver

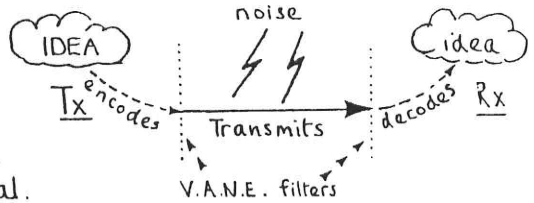
* ROLE OF GOOD COMMUNICATIONS
* DYADIC COMMUNICATIONS
* OTHER INFLUENCES

Communication - a 2-way process resulting in the transmission of information & understanding between two persons (Tx to Rx)

ROLE OF COMMUNICATIONS

- Provide information (upwards).
- Command & instruct (downwards).
- Influence & persuade (down; side).
- Integrate (sideways comm^{ns}).

PROCESS



DYADIC COMMUNICATIONS

- People interact using symbols
- At simplest level a stimulus seeks a response
- Effective communication is coloured by mutual perceptions, emotions & cognition.

- Verbal & non-verbal.
- V.A.N.E. = Values; Attitudes; Needs; Expectations.

OTHER INFLUENCES

- Proxemics
- Non-verbal factors
- Orientation

- Who sits where, & why?
- Covers spatial needs of people during their interactions.
- Eye contact; gesture; expression; tone; paralanguage; etc.

* EFFECTIVE COMMUNICATION
* BARRIERS TO COMMUNICATION

EFFECTIVE COMM^{n}:

Implies :-

- Improved written comm^{ns}
- Active listening
- Other ploys

Are they:
- Complete?
- Concise?
- Correct?
- Conversational?

- Regulate info. flows.
- Improve feedback & follow-up.
- Increase empathy for Rx
- Encourage trust.
- Improve timing.
- Involve repetition.
- Utilise the grapevine.

- LISTEN for content.
- Listen for feelings.
- Respond to feelings.
- Note verbal & non-verbal cues.
- Restate & give feedback.

BARRIERS TO COMMUNICATION

Will contribute to 'noise'; affect encoding & decoding info^{n} & cause communication failures.

- Frame of reference
- Selective listening
- Value judgements
- Source credibility
- Semantic problems
- Filtering
- In-group language
- Status differences
- Time pressures
- Communication overload

- Colours perception & acceptance of information.
- Rx accepts info^{n} re-affirming Rx's beliefs & filters out the rest.
- Made by the Rx, assigns 'worth' to the message.
- How the Rx perceives Tx affects the decoding process.
- Tx can only transmit symbols, understanding is in the Rx
- Transmits (upwards) only info^{n} perceived positive by the Rx.
- Useful & swift within the group.
- Comm^{ns} may break down across groups.
- Leads to short-circuiting of prescribed system.
- 'More' is not always 'better' if some messages are never decoded.

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THE MEETING OF MINDS

* WHEN IS IT NECESSARY ?
* WHY LEARN OF MIND & BRAIN ?
* AT WHAT MIND LEVEL ?
* THE CONSCIOUS MIND
* THE SUB-CONSCIOUS MIND

WHEN IS IT NECESSARY ?

- During interviewing & counselling
- During negotiation activities
- During 'selling' activities to reach 'closure'.
- During any serious discursive meeting

- To reach unanimity or agreement.
- To reach agreement or compromise.
- For decision making; problem solving; creative activities; etc.

WHY BOTHER TO STUDY IT ?

- To learn how to motivate & stimulate yourself.
- Understand what motivates and stimulates others.
- The better to communicate
- To control your own mind & actions

- To your advantage eg. when selling.
- To 'their' advantage eg. when counselling.
- Leading to better mental & physical health.

AT WHAT LEVEL ?

The mind has 2 working levels :-

- The conscious level
- The sub-conscious level 'Sixth sense'

- Seems to operate in 'on-the-spot' circumstances & instantaneously. More often evident when there is excitement in your life (physical or intellectual) or a slice of fear in your activities.

THE CONSCIOUS MIND uses under 20% (estimated) of the brain. Deals with speech, actions & overt activities.

THE SUB-CONSCIOUS MIND uses over 80% (estimated) of the brain – the largest, creative, analytical and powerful part of the brain. Deals in imagery by visualising & creates ideas, plans & solves problems.

THE CONSCIOUS MIND

- Smaller – less creative due to continuous sensory overload from external stimuli

- Noise; light; smells; etc.

THE SUB-CONSCIOUS MIND

The master mind :-

- Probably under-controlled, under-used, not understood – not even considered by the majority of people
- The part of another individual to be reached for all successful communication & influencing
- It mainly influences our non-verbal communications

(Reached in part by repetitive visual images)

Learn how better to stimulate it & use it to achieve .....
- increased power of concentrated thought,
- increased powers for creativity & problem solving activities,
- the attainment of personal objectives.

Examples :- body language, paralanguage & aspects of proxemics & orientation.

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THE DEEPER MIND LEVELS

* YOUR UNCONSCIOUS MIND
* THE SUB-CONSCIOUS MIND
* CONDITIONING THE SUB-CONSCIOUS TOWARDS GOAL ACHIEVEMENT

YOUR UNCONSCIOUS MIND

- Has been conditioned since birth by watching, listening, experiencing, etc.
- It is the seat of your fears, attitudes, behaviours, etc. which affect how you behave today.
- Can be consciously worked upon to recognise & gradually disperse fears, attitudes, etc.

THE SUB-CONSCIOUS MIND

- The analytical creative part of the brain which produces ideas & reasoned solutions to problems.
- It impells but does not compell & often gets over-ruled by the conscious mind.
- Works most effectively when not under sensory bombardment from external stimuli
- Works most effectively to produce ideas when you are not actively (consciously) thinking
- May be fed with visual images of what you wish to attain
- You may input influences but it is not normally under your control.

- The features of 'controlled breathing' & 'meditation' will induce a state of beneficial calm. (See below)*
- It is important NOT to think but to keep the mind blank.

- Tangible & intangible goal 'images' eg. wealth; status; love; power; etc.
- It creates plans for their attainment if that is what you want.
- Useful in self motivation (if you are without role models or self-help books) to help you achieve objectives.

TOWARDS GOAL ACHIEVEMENT

- Be enthusiastic about your goals.
- Whatever you want, ACT as if you have it.
- Whatever you want to be ACT as if you are.

- Rehearse the future in your mind's eye.
- Act 'enthusiasm' & it becomes reality.
- It is impossible to learn, store, remember & recall knowledge without enthusiasm for the subject matter.

* Beneficial calm requires

- QUIET (silence)
- STILLNESS (inactivity) &
- SOLITUDE

Assigning time daily for this (in)activity will lead to the achievent of action through 'non-action'.

All achievement & earned riches begin with an IDEA. Good ideas come when you are NOT thinking consciously. Leave thinking to the subconscious mind.

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THE INFLUENCING OF MINDS

- ✳ SUBCONSCIOUS PERSUASION
- ✳ MIRRORING BEHAVIOURS
- ✳ WHY COMMUNICATE SUBCONSCIOUSLY ?
- ✳ SUBCONSCIOUS COMMUNICATIONS

SUBCONSCIOUS PERSUASION

- Recognise that you can influence/be influenced by non-verbal comm^n.
- Correct your own subconscious signals to convey what you want to convey → Alter your signals to match your words.
- Recognise what others signal.
- Use mirroring behaviour to produce subconscious rapport. → To become like him/her is to be recognised as not alien or a threat to them.

In any discourse between 2 persons, communication goes on at 2 levels ..... consciously & sub-consciously

MIRRORING BEHAVIOURS are

- Behaviours which match the other's (below the threshold of consciousness) → Examples :- in the way you dress, sit, gesture, speak, breathe, behave, etc.
- Listen to whether they use VISUAL, AUDITORY or KINESTHETIC words in speech patterns & use the same sentence structures → Examples :- 'Do you see?' 'Yes, I get the picture.' 'Having a rough time?' 'We'll smooth things out.'

CONSCIOUS COMM^NS uses :-

- ►Spoken words
- ►Written words
- ►Physical presence
- ►Silence
- ►Eye contact
- ►Listening
- ►Feedback
- ►Body movements
- ►Orientation (sitting/standing)

SUBCONSCIOUS (NON-VERBAL) influencing through :-

- Speed, intonation, tone, pitch, volume, context, etc.
- Inference, what is NOT said, 'reading between the lines.' → – What is implied ? – What do they mean ?
- Dress, proxemics, orientation, rituals, touching, culture & racial awareness, territoriality
- Interpretation, reflection.
- Eye movements as well as speech patterns indicate VISUAL, AUDITORY or KINESTHETIC persons
- Are they following ? how deeply ? estimating logic & rationality, restatements, paraphrasing.
- State of mind, (dis)agreement, emotions. → – Can result in stereotyping, manipulation, misinterpretation, erecting/removing barriers.
- Gesture, headnods, listening ploys
- Establishes status of superiority or inferiority of persons.

WHY COMMUNICATE SUBCONSCIOUSLY ?

- Subconscious signals indicate the other's information processing system.
- Listen; watch; & process subconscious signals to get all the information you need concerning the other person → – To sell to them. – To command them. – To persuade them. – etc.
- Adapt your communications to their processing system & you are nearer your goal of influencing them

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CONDITIONING RESPONSES (DURING INTERPERSONAL COMMUNICATIONS)

* WHY USE CONDITIONING RESPONSES ?
* ESTABLISHING 'SUPERIORITY'/ ACCEPTING 'INFERIORITY'
* 'ANCHORS'
* VALUE OF 'ANCHORS'
* C.R. & THE 'NEGATIVE' SELL

C.R.s are powerful tools for manipulating others in personal interactions

Over time we are conditioned (or can be conditioned) to respond to particular stimuli. Most useful are the feelings associated with personal achievement & pleasure.

ESTABLISHING SUPERIORITY

To get tough; put over your point of view or appear 'in charge' :-

- Stand, while they sit.
- Bring them to visit you.
- Sit 'higher' than the other person.

ACCEPTING INFERIORITY

To make others feel good :-

- Sit below other's eyelevel.
- Listen to his accomplishments
- Visit other's territory.
- Be the butt of other's jokes, or act the clown.

EXAMPLES
- for managers handling subordinates.
- for salespersons handling prospects.

- Territoriality.

- Do not match or outdo his story.

'ANCHORS'

- An action or word which triggers a reaction, usually very quickly, in another person
- Not easily perceived by the other person to the communication.
- Can also be used on yourself to produce personal feelings of 'well-being'

Just visualise or mentally reconstruct the circumstances of an earlier success.

EXAMPLES
- Touch, to a rape victim.
- Music, to a romantic.
- Parents' facial expression, to a child.
- Smell, to recall memories of past events.
- TV advertising catchphrases, to trigger purchases.

- In selling activities, identify or manufacture anchors to hook into prospects' feelings of well-being during or while closing a sale.
- In 'persuasive' activities to engender feelings of well-being in the other person towards self.

- Putting something outside a person's reach triggers a stronger desire to own it.
- Telling people they are not producing adds negative to negative & MAY trigger a good positive reaction to prove you wrong.

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BEHAVIOUR PATTERNS AT MEETINGS (NOT PUBLIC MEETINGS)

* BEHAVIOUR PATTERNS
* NEGATIVE BEHAVIOUR
* CONFLICT MANAGEMENT

PATTERNS fall into two classes:
- Quick to contribute
- Those who hold back

The chairman should be alive to the situation & restrain those who tend to dominate & encourage others to participate.

- Minds are made up.
- Not afraid to express themselves.

- Have no strong views.
- Shy, reserved or un-interested.
- Inhibited by the actions of others.
- Want to hear other views before contributing.

Ground rules for meetings.
When the meetings are unconcerned with 'Standing Orders' & 'Meetings Procedures' – ground rules are agreed beforehand. See outline 'Role of the Chairman'.

NEGATIVE BEHAVIOURS
- Fixed attitudes
- Silent members
- Talkative members
- Contentious members
- Lightweight members

FIXED ATTITUDES may be due to:
- a wrong understanding or shortage of facts,
- sees a challenge to their ideas as a personal attack,
- not open to rational argument if inflexibility is due to emotional reasons. (Chairman should sound out the causes after the meeting.)

SILENT MEMBERS
- Possibly reserved, over-awed or embarassed.
- Possibly ignorant, seeking info", or just thoughtful.

(Chairman must carefully frame & place questions to produce constructive comments.)

LIGHTWEIGHT MEMBERS
- May be a matter of temperament.
- May be the wrong person for this meeting.
- May be ill-prepared to participate.

(Chairman should investigate after the meeting.)

TALKATIVE MEMBERS
- Can be used to advantage if the talk is relevant.
- Otherwise their talk needs to be tactfully & firmly terminated.

CONTENTIOUS MEMBERS
- May be caused by members with polarised views on the subject.

(Chairman must prevent the meeting being disrupted & collaboration becoming impossible. Also keep the meeting 'temperature' cool.)

CONFLICT MANAGEMENT

The concern is not to eliminate conflict but to manage it constructively. Possible methods are:-
- Confrontation
- Forcing
- Smoothing
- Avoiding
- Bargaining
- Unilateral action

CONFRONTATION - Confront & openly discuss differences to seek mutually acceptable solutions.

FORCING - using power plays.

SMOOTHING - people discuss their differences & feelings rather than the substantive issues creating conflict.

AVOIDING - avoid sensitive issues.

BARGAINING - split differences to reach best compromise.

Individuals make up their own minds & act accordingly.

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Meetings are typical & common group activities. 'Madness is the exception in the individual but the rule in groups.'
FREDERICK NIETZSCHE

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USE & ABUSE OF MEETINGS (1 of 2)

* THE VALIDITY OF MEETINGS
* WHY MEETINGS MATTER
* WHEN TO CALL A MEETING

THE VALIDITY OF MEETINGS

Assumes :-

- There is a task requiring corporate action
- Varied views, knowledge & experience are required.
- There is better identification for, & commitment to mutually agreed solutions.
- Ideas (& their consequences) are more precisely evaluated by a gp.

- Corporate efficiency depends upon ensemble mgt.
- Chairman sees boundary problems.
- Members see mainly organisational problems.

WHEN TO CALL A MEETING

- When decisions require judgement
- When pooling ideas improves the chances of good decisions.
- To discuss multi-faceted problems requiring different skills or specialists
- If acceptance of the decision is important for the members.
- The matter requires group discussion to avoid bias.
- 'Instantaneous' communication is necessary to all parties.
- The information to be passed is of interest to all participants.

- Divide the meeting into sub-groups requiring different skills or specialists.

- Rather than calculation or expertise.

WHY MEETINGS MATTER

- Sharpens people's feelings for the business.
- Group discussion is a powerful persuader.
- Subordinates support decisions they help to make.
- Fewer gross errors than from individual decision making
- For talent tapping
- For political reasons

- Committees are often denigrated but they do become relatively more efficient with time. (Group processes come into play.)

- Group action is an alternative & not a substitute for individual action.

- The more minds - the more ideas generated.

- To initiate action where an individual might be ignored.
- A top executive's power/actions may be curbed by the meeting's decisions.
- Where democratic decision making must be seen to be done.
- 'Acceptance' of the decision is important for the members.

- It can even sustain harsh or unpopular actions.

∝ Issue 1

11.48

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USE & ABUSE OF MEETINGS (2 of 2)

* WHEN NOT TO CALL A MEETING
* ESSENTIALS OF AN EFFECTIVE MEETING
* REASONS FOR DIS-SATISFACTION OVER MEETINGS

DO NOT CALL MEETINGS.....

- To solve routine problems — eg. approving small expenditures; drawing up work rosters; etc.
- For simple problems with 'correct' answers — Give it to a technical expert to make recommendations for action.
- For subtle reasoning problems — Sometimes difficult for large meetings to follow subtle arguments.
- When you cannot demonstrate the 'correctness' of a particular solution — Great inventions / innovations come more commonly from individuals rather than from committees.
- As a substitute for individual effort. — You may have to face the consequences of your 'solo' actions.
- When saving time & money is a critical consideration — Where a committee may cloud the issue, use an expert.

ESSENTIALS

- It must be properly authorised.
- It must be mobilised — Participants selected & informed.
- It must be properly controlled — Participants to receive minutes; agenda; etc. / Time allowed to prepare contributions. / Role of chairman is to control contributions & influence its direction.
- It must have a purpose

Participants must know & understand :

- Its responsibility & objectives.
- How representative it is of others.
- How it can make decisions or offer advice.
- How it can authorise action.

CONSIDER THE COST OF MEETINGS

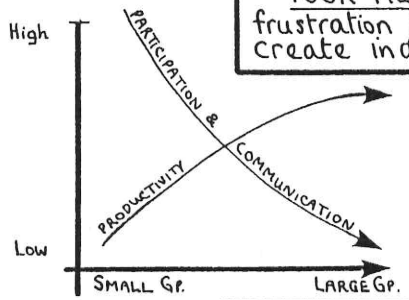
- How many manager/hours used up?
- Could any manager be replaced by a junior?
- Are there any 'passengers' who do not contribute?

DIS-SATISFACTION because:-

- 'Its a waste of time!' — Should not have been called.
- We don't have authority to act. — Inadequate preparation time has been allowed.
- Its too large a group — We are short of the information/ expertise needed for us to continue.
- Inadequate control by chairman.
- Inadequate direction by chairman.

- Properly authorised, a responsible meeting should have authority to act/recommend action.
- Without authority :
  - Responsibilities are unclear.
  - Problems are talked about & not through.
  - Produces compromises rather than clear-cut solutions.

GOOD MEETINGS arouse enthusiasm; develop initiative; increase commitment to corporate objectives.
POOR MEETINGS promote frustration & ill-feeling; create indifference.



A committe represents a temporary work group, created for a purpose & possibly disbanded afterwards.

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∝ Issue 1

THE ROLE OF THE MEETING'S CHAIRMAN

(NOT PUBLIC MEETINGS)

* THE APPOINTMENT OF THE CHAIRMAN
* MAIN FUNCTION OF THE CHAIRMAN
* WHAT COMMUNICATION PROCESS ?

APPOINTMENT OF CHAIRMAN

- In corporate executive meetings the chairman would (usually) outrank organisational factions (departmental / sectional heads) holding positional power & authority.

MAIN FUNCTIONS

- To plan & set objectives for the meeting
- To establish ground rules
- To preside over the meeting
- To introduce & state the issues.
- To ensure each participant gets a fair hearing.
- To control the conduct of participants.
- To sum up & state the conclusions reached

- Be clear of the terms of reference & purpose of the meeting.
- Prioritise items & allocate time accordingly.

EXAMPLES

- Encourage careful listening.
- Conflict is OK & differing opinions may be aired.
- Anyone may seek clarification.
- Expression of feelings is encouraged.
- Consensus means everyone is heard & understood with equal opportunity to influence the outcome.
- Consensus means we will stand by the decisions taken.

- Decide Action Plans containing technical elements; motivational elements; etc. specified in writing. Each member accepts & is committed to them.

- & remain the focal point of the meeting.

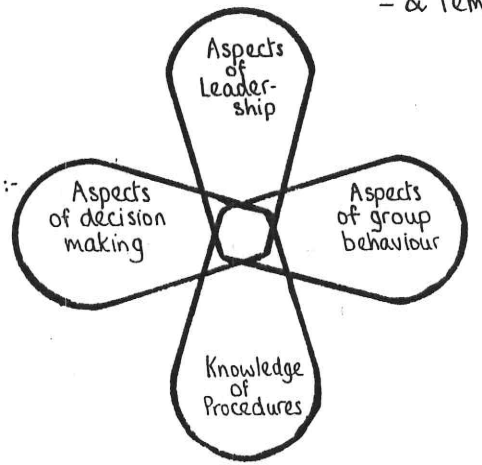
WHAT PROCESS ?

- 1-way communication - giving out information & instructions permitting questions only to ensure understanding.
- 2-way communication - discussion meetings to interchange information. Mainly briefings.
- 3-way communications - for decision making & problem solving

The quality of decision making relates to the ability of the group to maximise the use of available resources.

CHAIRING MEETINGS

involves some mastery of :-



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Contents

	Page No.
PART 1 MANAGERS' SKILLS	
Prejudice & Managing People	12.01
Perception & Managing People	12.02
Management Development through Mentoring 1	12.03
Management Development through Mentoring 2	12.04
Principles of Motivation	12.05
Situational Leadership 1	12.06
Situational Leadership 2	12.07
Team Briefing 1	12.08
Team Briefing 2	12.09
Team Briefing 3	12.10
Role Concepts for Managers	12.11
Leadership 1	12.12
Leadership 2	12.13
Looking to Save Time 1	12.14
Looking to Save Time 2	12.15
PART 2 PRODUCTION/OPERATIONS MANAGMENT	
Production/Operations Management	12.16
Role of Production/Operations Management	12.17
Product/Service Planning & Investment	12.18
Managing Projects	12.19
Productivity	12.20
Process Choice	12.21
Managing for good performance	12.22
POM - Facilities Layout	12.23
The Study of Work 1	12.24
The Study of Work 2	12.25
Principles of Production/Operations Planning	12.26
Production/Operations Control	12.27
Capacity Investment Decisions	12.28
Developments in Manufacturing Systems	12.29
Inventory Management	12.30
Inventory Control	12.31
Quality Assurance	12.32

PART 3 MARKETING

Marketing Information Systems	12.33
Marketing Research	12.34
Demand Measurement & Market Estimation	12.35
Forecasting Future Demand	12.36
Market Segmentation	12.37
Market Targeting	12.38
Product & Service Positioning	12.39

PART 4 ORGANISATION & CHANGE

The Role of Management Accounting	12.40
Attributes of Organisations	12.41
Organisations - Power & the Political Context	12.42
Attributes of Organisational Change	12.43
Organisational Change Strategies	12.44
Influencing Change in Corporate Culture	12.45
The Value of Corporate History	12.46
Strategic Thinking & Planning 1	12.47
Strategic Thinking & Planning 2	12.48
Organisation Design - Cultural Context	12.49
The Organisational Environment	12.50

KEYWORD INDEX 51-54

PREJUDICE & MANAGING PEOPLE

DEFINITION:- Prejudice is an attitude (usually negative) towards members of some specific group (racial; social; sexual; etc.) causing the person to evaluate others solely on their membership of that group.

✳ THE BASIS OF PREJUDICE

A cluster of preconceived notions known as stereotypes. They stem from:-

- Learning experiences in early life
- Negative inter-group contacts
- The presence of certain personality traits

STEREOTYPES, once formed, exert a powerful influence on one's thinking & perception of others.

- It assumes all group members possess similar traits or will act in the same manner.
- It distorts the processing of new social information.
- Stereotypes are common & persist in people's minds taking possibly decades to change.

PERSONALITY TRAITS

- Certain traits may pre-dispose individuals towards prejudiced behaviour eg. authoritarian individuals may punitively reject groups other than their own; others may persist in rigid black/white thinking.

NEGATIVE INTER-GP. CONTACTS

- Where different groups strive for the same resources eg. housing; power; jobs etc. there contacts are usually competitive & possibly hostile. Strong negative attitudes arise.
- Where different groups cooperate in joint endeavours, such feelings are reduced.

SOCIAL LEARNING EXPERIENCES

- The cultural attitudes & beliefs of parents are often transmitted to their offspring & accepted without question.
- Expression of such prejudiced views rewarded by parents, peers, teachers, etc.
- Exposure to such views in the mass media also conditions the mind.

✳ ORGANISATIONAL IMPLICATIONS

IMPLICATIONS

- The avoidance of prejudice within organisations can lead to positive discrimination in recruitment & selection procedures (subconsciously)
- Union/management interfaces are often roughened un-necessarily by ancient prejudices.
- The wording of Job Descriptions & Person Specifications must always be above legal challenge.
- Also equal pay requirements for equal work.

In favour of:

- more female employees;
- more ethnic employees;
- employing handicapped workers;
- etc.

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PERCEPTION & MANAGING PEOPLE

PERCEPTION :- the active psychological process in which stimuli are selected & organised into meaningful patterns.

✳ PERCEPTION & THE EMPLOYEE

✳ PERCEPTUAL SELECTIVITY

EMPLOYEE'S PERCEPTIONS
How they perceive things is important since :-
- Humans do not behave in accordance with reality but how they perceive reality to be
  - They distort their perception of the world to make it congruent with their set of beliefs.
- Where there are gaps/ambiguous patterns in stimuli 'closure' occurs in an attempt to make it intelligible & useful
  - 'CLOSURE' Employees will group people/stimuli & make inferences from them that may be incorrect
    - The basis of the 'grapevine' information & communication system.

SELECTIVITY Our minds & attitudes are conditioned from birth by our culture & upbringing & leads us to perceptive selectivity. This colours our judgement of others leading to :-
- The 'HALO' effect
- Stereotyping

'HALO' EFFECT
Screens out information selectively if it conflicts with our quick assessment of people & situations. Results :
- We look for characteristics we can recognise & relate to.
- We give uneven importance to different information inputs.
- We judge more favourably those characteristics which are common with our own
  - Possible impacts on the org'n :-
    - We recruit staff in our own image (clones)
    - We discriminate against (or in favour of) special groups of workers eg
      - women managers;
      - ethnic minorities;
      - young workers; etc.

STEREOTYPING
We organise our perceptions & group together people with similar characteristics, then allocate traits to the groups. Overgeneralisation is the result.
Possible outcomes of opinions eg. - an inevitable polarisation all managers want to grind us down! all trade unionists will behave in the same unreasonable way! Female managers are bossy! etc.

STEREOTYPING is useful if it .....
helps us make predictions about what others are likely to do next so guiding our behaviour in relating or reacting to others. (Implicit personality theories.)
eg. understanding groups; marketing; etc.

✳ ORGANISATIONAL IMPLICATIONS

- We all make personality assessments; usually rapidly; oversimplifying; based on too little information & usually making mistakes in the process
  - Because we rarely interact with the 'whole person'.
- So many organisational problems are basically 'people' problems
  - All individuals are different; perceiving people & situations differently & reacting differently when in similar circumstances.
  - Managing people is a complex activity if you are to avoid conflict & misunderstandings.

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MANAGEMENT DEVELOPMENT THROUGH MENTORING (1 of 2)

(P)-Protégé (M)-Mentor

- ✳ HOW DOES IT WORK ?
- ✳ WHAT IS INVOLVED ?
- ✳ WHY HAVE MENTORING ?
- ✳ SELECTING PROTÉGÉS
- ✳ SELECTING MENTORS

WHAT IS MENTORING ? A senior manager/executive takes a young bright employee under his/her wing.
DEFINITION - a relationship in which one person (MENTOR) is responsible for the career & development of another person (PROTÉGÉ) outside the normal manager : subordinate relationship.

HOW DOES IT WORK ?

- The relationship is structured & refined to become an integral part of a mgt. development process for young professional trainees.

WHAT IS INVOLVED ?

It could involve :-

- Appraising or otherwise selecting potential protégés to identify suitable candidates for mentoring
- Training & counselling mentors to improve interpersonal skills
- Training & counselling protégés for management development coaching.
- Providing psychological support to (P).
- Protecting & sponsoring of (P) & (M).

- Usually highly-rated, able, management trainees &/or graduates.
- Young, professional trainees.
- Under-represented groups, eg. women.
- Positively discriminating in favour of ethnic minorities.

- Appraising ; interviewing ; counselling ; career planning skills ; etc.

WHY HAVE MENTORING ?

Principally for the benefits which result for :-

- The PROTÉGÉ
- The MENTOR
- The ORGANISATION

PROTÉGÉ BENEFITS include :

- Improved individual performance.
- Grooming for promotion.
- Enhanced commitment to the organisation.
- Personal support.
- Coaching, teaching & counselling.
- (P) given a role model to observe.
- Career planning support.

MENTOR BENEFITS include :

- Psychological rewards to pride ; ego ; satisfaction ; etc.
- Job enrichment.
- Career enhancement.
- Status boost.
- Opportunity for role modelling.

ORGANISATIONAL BENEFITS

- Improved individual performance & productivity.
- Faster induction of new employees.
- Improved succession planning & management development.
- Reduced training costs.
- Enhanced commitment to orgn
- Improved levels of communication

Graduate half-life may extend from average 3 yrs. to average 6 yrs. for (P).

- Stops the training of managers who then leave to join your competitors.

SELECTING MENTORS

Usually by designating individuals who are :-

- Proven ; technically competent ; with interpersonal skills.
- Good motivators & communicators
- Good role models for (P)s.
- Competent managers

SELECTING PROTÉGÉS

Methods may vary from :-

- Some means of formal appraisal or interview.
- Informal recommendation by line managers.
- Written test & interview.
- By application, followed by interview.
- Ability & personality testing resulting in a recommendation.

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MANAGEMENT DEVELOPMENT THROUGH MENTORING (2 of 2)

(P) = PROTÉGÉ
(M) = MENTOR

- ✳ ROLE OF MENTOR
- ✳ PREREQUISITES OF A MENTORING SCHEME
- ✳ PROBLEMS WITH MENTORING

ROLE OF MENTOR

- To assist (P)'s career progression
- To meet formally periodically to review work & learning.
- To plan a balanced spread of activities & experiences.

→ Using planned experiences to meet the expectations of (P)'s career development.

DESIRABLE PREREQUISITES OF A MENTORING SCHEME

- Acceptance of- & support for the programme by senior management.
- Appointment of a scheme co-ordinator.
- Careful briefing of (M) & appropriate training.
- A documentation system.
- Matching (M) to (P)'s specific interests & personality
- A performance appraisal system
- A quality audit of managerial resources to translate company strategy into managerial resource requirements.

→ – To ensure formal review appointments are made & kept.
– To structure & record important parts of the mentoring review meetings.
– To provide notes for the guidance of (P) & (M).
– To define standards to be applied when appropriate.

→ – Builds interest & contacts for (P)'s future career.

→ – If one does not exist then it should be set up to identify management trainees & graduates with present & future potential.

PROBLEMS WITH MENTORING

Identified problems include:-

- A large time commitment by (M) for this 1:1 relationship
- Often inadequate definition of (M) & (P) roles
- Resentment & resistance from (P)'s line manager.
- Lack of continuity from training programme to post-training career.
- Mentoring is contrary to the company culture
- Schemes need rejuvenating every 3 or 4 years.
- Resistance from senior management
- Able people (P)s become very useful & consequently are not permitted the breadth of experiences possible by their line managers.

→ – Sometimes it is too large & the system fails.

→ – Where little trust exists between levels of management & workforce.

→ – Possibly due to..... changes in organisational structure; changes in the business climate; original objectives no longer relevant.

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12.04

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PRINCIPLES OF MOTIVATION

* HEDONISTIC DOCTRINE
* CONTENT THEORY
* PROCESS THEORY

HEDONISTIC DOCTRINE – to maximise pleasure & minimise pain leads to :-
- CONTENT theories, &
- PROCESS theories of motivation.

These theories complement rather than compete with each other.

The correlation between Job Satisfaction & Performance is low but Job Satisfaction reduces absenteeism and staff turnover.

cf Issue 1.

CONTENT THEORY identifies :-
- People's needs & motives, &
- What people will / will not value as work rewards.

Exponents are :-
- Maslow
- McClelland
- Herzberg

Maslow's hierarchy of Needs.

Lowest – physiological
– safety
– social

Higher order – esteem
– self-actualisation.

Assumptions :- Deficit Principle, a satisfied need is not a motivator.
Progression Principle, any level need is only activated once next lower needs are satisfied.

PROCESS THEORY offers a more dynamic alternative by understanding cognitive processes which influence people's behaviour.
- EQUITY theory
- EXPECTANCY theory (Vroom)
- REINFORCEMENT theory

Reinforcement theory :-
- Behaviour which results in a pleasing outcome will likely be repeated, if it results in unpleasant outcomes it is likely not to be repeated.
- Reinforcement theory seeks to manage rewards by identifying EXTRINSIC rewards with positively valued work outcomes & using them to regulate behaviour.

Herzberg's dual factor theory.

Argues two types of motivator :-
- Motivators which lead to Job Satisfaction eg. recognition; advancement; responsibility; etc.
- Hygiene factors which reduce dis-satisfaction eg. money; status; security; company policy; supervision; etc.

(Replicative studies failed to offer strong support for fully comprehending Job Satisfaction but this theory is an important contribution in the field of organisational behaviour studies)

McClelland's acquired needs theory.
- Each person has needs for
  - achievement (n ACH)
  - affiliation (n AFF)
  - power (n POW)

The sum of these needs gives one's 'need profile'.
- Managers should learn to identify these needs in themselves & subordinates to create work environments responsive to subordinate's 'need profile'.

Vroom's Expectancy theory.
(Path-Goal concept)

Argues that Performance (P) is a multiplicative function of Motivation (M) & Ability (A) Performance = f (M, A)
- Task motivation varies with the utilities of performing the task, and
- The belief that performance & outcome are linked. Outcomes may be (+ve) achieving or (-ve) avoiding something.

EQUITY theory argues :-
- A felt inequity is a motivating state of mind.
- Inequity arises from social comparison of outcomes (rewards) for equivalent work inputs.
- Perceived inequity may result in :-
  - +ve inequity ➤ you receive more than others relative to work inputs.
  - -ve inequity ➤ you receive less than others.

  - a change of work inputs.
  - a change in rewards received.
  - leaving the situation.
  - a change in comparison points.
  - distorting the comparisons.

12.05

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SITUATIONAL LEADERSHIP 1 (of 2)

* POSSIBLE STYLES OF LEADERSHIP
* FOLLOWER COMPETENCE LEVELS
* SITUATIONAL LEADERSHIP
* MISMATCHING OF D. & S.

"I say - you do"

STYLES OF LEADERSHIP
- S1 – direction
- S2 – direction & support
- S3 – support & encouragement
- S4 – delegation

Situational leadership implies that the leader provides for the followers what the followers cannot provide for themselves.

EXAMPLE: coaching style builds confidence onto moderate competence.

Listen to their problems & find what's wrong.

FOLLOWER COMPETENCE (DEVELOPMENT) LEVELS
- D1 – low competence : high commitment → 'Enthusiastic beginner.'
- D2 – moderate compᶜᵉ : low commitment → 'Disillusioned learner.' "Why am I doing this?"
- D3 – high competence : variable con't → Confidence crisis.
- D4 – high competence : high commitment → 'Peak performer.'

SITUATIONAL LEADERSHIP

LEADER :-
- Identifies the development level of the follower(s) & selects the style which best suits the situation

FOLLOWER :-
- May contract with the leader for the style which best suits their perceived development level.

– Leader needs skill in diagnosing DLs & flexibility to move between styles as appropriate.

COMPETENCE comprises knowledge, expertise & skill.

COMMITMENT comprises confidence in doing a job & motivation to do it.

DEVELOPMENT LEVELS (DLs)
- DLs. are task specific for people. (Good at some things but not others.)
- DLs. are the subject of discussion between leader & follower(s).
- Objective ► WIN : WIN situations with agreement on DL & style to use.

MISMATCHING D. & S.
- Follower is oversupervised
- Follower is undersupervised

– Followers don't want the leader around if they are competent.
– Leader frustrates followers.

– Delegation is O.K. for peak performers but inappropriate for less competent followers.
– Leader frustrates self.

12.06

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SITUATIONAL LEADERSHIP 2 (of 2)

(Contracting for Leadership Style)

* CLEAR GOAL SETTING
* CONTRACTING FOR LEADERSHIP STYLE

GOAL SETTING

Leaders & followers decide, first separately & then together

- What are their key goals & objectives?
- What are your key goals & objectives?
- Are performance standards clear?
- What does good behaviour look like?

– Agree on goals & performance standards.

– If you cannot measure it, you cannot manage it!

CONTRACTING FOR L'SHIP STYLE

- Analyse their DLs & look for WIN:WIN situations.
- Which style, S1 to S4? Tell me which style you want.
- Let them decide how to administer styles S3 or S4
- Leader decides how to administer styles S1 or S2
- When can you change your style from S1 upto S4?

– Ask your subordinates for a contract.

– Subordinates schedule meetings & agenda.

– Leader schedules meetings & agenda, talk or training?

* TRAINING PEOPLE TO BECOME COMPETENT / WINNERS

- Tell them what to do.
- Show them what to do.
- Let them try parts of the task.
- Observe their performance.
- Praise their progress

} Directive behaviour, performance standards illustrated

– Cut back on direction & give responsibility

– See what goes right.... ...redirect them if errors are evident, be supportive.

Reducing directive behaviours.
Increasing supportive behaviours.

* SITUATIONAL LEADERSHIP

- You meet your subordinates where they are at.
- It gives them the leadership style to make them winners.
- Performance without the leader or supervision is still up to standard

(If performance slips, revert from S4 ► S3 ► S2 ► S1 in stages.)

S3 Aims for supportive leadership & delegation while reducing directive behaviour.
S4

– What is important is not what happens when you are there but what happens when you are not there.

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TEAM BRIEFING 1 (of 3)

* WHAT IS TEAM BRIEFING ?
* WHY BRIEF YOUR TEAM ?
* BENEFITS OF TEAM BRIEFING

TEAM BRIEFINGS must be :-

- A face-to-face meeting of team leader & team members
- Organised by the person (leader) responsible for the team's results
- Uses small groups (4-15)
- A regular activity
- For passing relevant information affecting team performance features
- Monitored for their effectiveness
- In addition to daily communications & casual contacts.

- Usually about 30 minutes duration including Q-time.
- Permits 2-way communication.
- Staged – from boardroom level to the shopfloor.
- Question & answer sessions ensures clear understanding
- Commonly by your immediate boss.
- Too large groups discourage constructive comments &/or questions from members.
- If numbers are likely to be large split the group & hold more than one session.

WHY BRIEF YOUR TEAM ?

- Employees must know what is required of them.
- It clearly indicates who is in charge of the team.
- It is a part of the leader's role.
- It shows the leader has been briefed himself/herself.
- It helps you & your team to think & plan ahead.

- It is an effective & proven method of increasing team cohesion by mutually discussing goals, successes & failures.

RELEVANT

- 'Core brief' information comes from your manager (1/3).
- 'Local brief' information is your responsibility (2/3).
- Total brief should ensure their attention & commitment & improve morale.
- Complex information should be available in written format too.

REGULAR

- Too large time gaps in between & they lose their effectiveness.
- Time enough to observe & report back on performance.
- Set dates for next 6 months.
- Informs employees of management's decisions.

MONITORED FOR EFFECTIVENESS

Where your team (in turn) brief others :

- give written briefs where necessary,
- occasionally sit-in on their sessions,
- check their 'local brief' for accuracy,
- correct variances,
- walk-the-job occasionally & effect random checks with individuals.

BENEFITS OF TEAM BRIEFING

- Face-to-face communication reduces misunderstandings
- Increases motivation & commitment to the team's tasks
- Improves feedback to management
- Maintains management's initiative as the primary information source.
- Communication within the organisation is vital
- Makes people talk to their staff.

- In the absence of 'hard' info., the 'grapevine' flourishes.
- Not the time nor the place for 'consultation' or discussing grievances or altering management decisions but for requesting opinions through representatives at duly convened consultative meetings.
- Keeps people in contact with 'what they do & why they do it.'

12.08

Issue 1

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TEAM BRIEFING 2 (of 3)

* ATTENDING A BRIEFING SESSION
* WHEN BRIEFING OTHERS
* MAKE IT RELEVANT

ATTENDING A BRIEFING

When being briefed :-

- Listen to the subject matter & key points.
- What key points affect me/my team?
- Do you understand well enough to brief your subordinates competently?
- Keep/take notes as is most appropriate

If in doubt about how it will affect you, ASK QUESTIONS.

As a record :
- for future reference,
- for clarification later,
- to prepare for your next briefing session.

BRIEFING OTHERS

- Greet them & confirm the groundrules for the briefing
- Brief them according to your notes & stress key points to be passed on
- Where you can illustrate the points, do so
- Attempt to keep formality to minimum.
- Invite RELEVANT questions
- Check their understanding
- Note absentees - to be briefed later.
- Don't cancel planned sessions, send a deputy.

- Questions only on matters being briefed & following that item.
- At this stage you give out info:, NOT discuss it.
- Improves understanding, adds impact.
- Don't know the answers? Say so, find out later & report back.
- Contentious issue? Leave it & come back later with facts & reasons.
- Positive comments? Note, but don't discuss them now.

MAKE IT RELEVANT

- Emphasise key points & info: relevant to your team members.
- Do not comment upon senior management decisions other than favourably
- Prepare 'housekeeping' & local performance matters in good time
- Develop a checklist of subjects for this & future meetings

What do they NEED to know:
- to do their jobs efficiently,
- to see their role in a company context.

- REMEMBER you are representing senior management. You WILL show commitment to their decisions though you may not agree with them. "This is what it means to us ....."
- Check these with your boss beforehand.

UNDERSTANDING

- Short-term memory of spoken words is very poor. Repeat & reinforce important information. "Tell them what you're going to tell them, tell them, then tell them what you've told them."

* RECEIVING FEEDBACK

- End the briefing session.
- Invite positive suggestions for improving efficiency
- Re-affirm that decisions already taken will stand.
- Listen to, & note their comments.

- On briefing sessions in general.
- On other features of their task.

REMEMBER Team briefing is not the only way to communicate within organisations.

12.09

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TEAM BRIEFING 3 (of 3)

* MEETING PREPARATION
* BRIEF PREPARATION
* PRESENTING YOUR BRIEF
* FOLLOW-UP

MEETING PREPARATION

- Check the date of your briefing session
- Check the location & list of attendees
- Plan & order the briefing agenda
- Decide the duration of the meeting
- Allocate approximate times to items.
- Will any visual aids be needed?
- Any written materials to prepare for distribution?
- Explore dates for future briefings

- Monthly?
- More frequently if necessary.
- Not too long after receiving your CORE brief.

- Plan to be near to the job; to avoid disturbances & to seat the team in reasonable comfort.

- Regularity & continuity are important.

BRIEFING AGENDA

Comprises CORE brief & items of a 'local' nature. Rank local items in order of importance ..... 'must be covered' & 'would like to cover but could wait'.

DURATION

- Long enough to give the core brief and key points of the local brief.
- Too much information will take too long to impart.
- Too long meetings means concentration will wane.
- Remember the duration of the meeting constitutes 'downtime'. Make it worthwhile.

BRIEF PREPARATION

- Refer to your briefers' file
- Review the 'CORE' brief
- Prepare the 'LOCAL' brief items & review them with your boss.
- Anticipate possible questions which may arise - prepare answers.

BRIEFERS' FILE contains:

- Past briefs & feedback notes & questions.
- Core brief - from recent meeting.
- Items for the local brief - next meeting,
  - future meetings.
- Information updates as required/requested.

CORE BRIEF

Amend & personalise it for:

- your own group/team/meeting.
- your own presentation style.

PRESENTING YOUR BRIEF

- Are you new to this?
- Can they hear you clearly?
- Try to avoid straight reading of your brief
- Is the information of a technical nature or complex?
- Handling questions

- Adequate preparation reduces nervousness.
- Take it slowly & try to make it interesting.
- Remember to keep briefings BRIEF

- Can you raise your voice without shouting or sounding ridiculous?
- Now tell them the ground rules & the time you plan to end.

- Support your briefing with handouts, refer them to it.

- Keep control of the question session - accept only relevant Q's.
- Your answers to their questions - confident, clear, brief.
- Use your own question's to seek feedback from them.

PRESENTATION HINTS

Maintain eye contact as much as possible to pick up non-verbal feedback.

- Puzzled expressions show lack of understanding
- Lack of concentration & interest if bored, distracted or the info^n is irrelevant.
- Straining to hear over other noises?
- Cross looks indicates what they hear does not please them. Be prepared!

FOLLOW-UP

- Note absentees, plan to brief them separately, within 48 hours.
- Keep records, research questions which have arisen.
- Walk-the-job to check understanding & receive feedback (informally).

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Issue 1

ROLE CONCEPTS FOR MANAGERS

* THE MANAGER'S ROLE
* ROLE STRESS

MANAGER'S ROLE

- Wherever a person ranks in an organisation's hierarchy, peers, superiors & subordinates have EXPECTATIONS of that person
- Sometimes role 'SIGNS' help to make expectations more explicit

Whatever role managers play in their private or working lives, they are at the focus of a group of persons (SET) with whom they interact.
(Terms - ROLE SET & FOCAL PERSON)

- ROLE EXPECTATIONS

EXAMPLES, a uniform with badges of rank; status symbols (office size & furnishings); rituals (salutes or greetings)

ROLE STRESS

This could be the outcome of :-

- Role CONFLICT
- Role AMBIGUITY
- Role INCOMPATIBILITY
- Role 'OVER-/UNDER-LOAD

Some stress is beneficial (EUSTRESS) but excess stress may cause DISTRESS.

- From the need to operate in 2 (possibly conflicting) roles eg. friend & boss
- Where the manager's perception of his/her role differs from what others see for that role.
  - They may interact in an unexpected manner with that manager.
  - Can be lessened if you have a Job Description to define the role.
- When expectations of members of the role set are incompatible with the actual features of the manager's role.
- Too many roles to handle leads to over-load.
- When the given role is below a manager's perception of his/her capability, it leads to stressful under-load.

Ambiguity usually results from the focal person's uncertainty about :-

- others' expectations of you;
- the scope of your responsibilities;
- your hopes of advancement;
- how your work is evaluated;
- limits of authority;
- etc.

* SYMPTOMS OF DISTRESS (See Outline 5.30 'Managerial Stress')
* DEALING WITH DISTRESS

- Withdrawal - from the organisation or behind psychological barriers.
- Rationalisation - learning to live with it.
- Repression - refuses to recognise a problem exists.
- Easing distress

- By compartmentalising one's life so roles do not overlap.
- By having the role re-defined in a new Job Description.
- By a re-assignment of role responsibilities.
- By regular appraisals & counselling.

* IMPLICATIONS FOR MANAGERS

- Recognise people have roles in an organisation & that perceptions of these roles vary & may give rise conflict.
- Many 'people problems' arise from people's misconceptions of role, & subsequent poor communications
- More frequent job changes for modern managers will result in 'role' problems

- Often frank discussion or counselling will render them 'non-problems'.
- Recognise it can happen & be ready to face it
- Compartmentalise work & family roles.
- Consider career changes to a less stressful role.

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LEADERSHIP 1

Leadership :- the ability to influence the behaviour of other people in a certain direction.

Issue 1

* CHARACTERISTICS OF LEADERS
* DETERMINANTS OF LEADER BEHAVIOUR
* LEADERSHIP FUNCTIONS

LEADER CHARACTERISTICS

Traits which are frequently present in leaders who achieve favourable results :-

- Solves problems creatively
- Communicates (& listens).
- Desire to achieve.
- Many interests & sociability.
- Positive attitude to subordinates.
- Self-confidence.
- Enthusiasm.
- Self-discipline.
- Manners.
- Emotional stability.

LEADERSHIP FUNCTIONS

Suggests it has 2-dimensions.

- Initiating structure, relating to task function & goal achievement.
- Consideration, relates to maintaining & strengthening the group.

DETERMINANTS

- Characteristics of subordinates – eg. training, experience, age, sex or other personal characteristics.
- The task – whether structured or unstructured.
- Organisational policy & climate
- Superiors – their power & or leadership styles.
- Peers & potential reinforcers.
- Leader's own characteristics – whether task or person oriented.
- Subordinates' responses – or reciprocal causation which evoke certain Leader behaviour.

* FIEDLER'S CONTINGENCY MODEL OF LEADERSHIP EFFECTIVENESS

Suggests you :-

- Understand your leadership style – Task- or relationship-oriented.
- Diagnose the degree of control offered in various leadership situations.
- Act to match your style with the situation, as appropriate.
- Correct mismatches – By altering the degree of control over the situation (prefered measure).
  – By changing your leadership style.

* HOUSE'S THEORY OF LEADERSHIP

Assumes leader's key function is to act to complement the work setting in which subordinates operate.

- Leader behaviour has 4-dimensions
- Contingency variables include :
  - subordinate's attributes, &
  - the work setting.

DIMENSIONS OF BEHAVIOUR

- Leader directiveness, concerned with guidance, standards & performance.
- Leader supportiveness, concerned to compensate for unfavourable conditions.
- Achievement-orientedness, causes subordinates to strive to perform.
- Participativeness, to promote ego-involvement of subordinates.

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LEADERSHIP 2

* VROOM & YETTON LEADERSHIP THEORY
* V. & Y. DECISION MAKING RULES
* LEADERSHIP AS A SYMBOLIC ACTIVITY

V. & Y. LEADERSHIP THEORY

- Assumes leaders can diagnose the various leadership situations.
- Assumes Leaders ARE flexible enough to change styles to fit situations.
- Related decision-making styles seek to achieve quality and acceptance of decisions.

AUTOCRATIC STYLES

Ai - Solve the problem / make the decision by yourself using info^n available at the time.

Aii - Subordinates provide info^n for you to decide the solution to the problem yourself.

CONSULTATIVE STYLES

Ci - Problem shared with sub^ates individually, then you make the decision.

Cii - Problem shared with sub^ates as a group, then you make the decision

GROUP STYLE

Gii - Problem is shared with subordinates as a group to reach concensus. Your role is chairman & you accept & implement the solution which the group supports.

DECISION MAKING RULES

Serve :-

- To protect decision quality
- To protect decision acceptance

- The 'acceptance' rule, where acceptance is critical, eliminates Ai & Aii styles.
- The 'conflict' rule, to reduce disagreement, eliminates style's Ai, Aii & Ci.
- The 'fairness' rule, when the process must generate acceptance, means only Gii is feasible.
- The 'acceptance priority' rule requiring equal partnership in decision-making leaves style Gii only.

- 'Leader-information' rule, when leader is without adequate information, eliminates style Ai
- 'Goal congruence' rule, when subordinates are unlikely to pursue organisational goals - avoid Gii style.
- 'Unstructured problem' rule, interaction is necessary with subordinates so Ai, Aii & Ci styles are eliminated

LEADERSHIP - THE SYMBOLIC ACTIVITY

- Leaders function to personify the organisation; its activities and outcomes & to serve as a scape-goat.
- The symbolic role with elaborate ritual & ceremony keeps alive the image of 'personal control'.
- Some belief in the importance of individual action will motivate other individuals in the organisation.
- They are accountable, hired to be fired, though often with little influence over activities & outcomes.

NEW PERSPECTIVES

VDL approach - leaders treat various subordinates differently & considers 'vertical dyads' (Leader-sub^ate pairs)

Kerr & Jermier - substitutes for leadership make the leader unnecessary.

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LOOKING TO SAVE TIME 1 (of 2)

* THE VALUE OF TIME
* 'INTERNAL' TIME WASTING FACTORS

- Personal incapacity
- Personal incompetence
- Too little delegation
- Personally disorganised
- Lack of planning

THE VALUE OF TIME

- Time is one of the 4 major resources available needed by an organisation
- Be aware of where you lose time & what it can cost

→ Time lost cannot be replaced so use it to advantage.

→ UNAWARE OF TIME LOSSES?
- Measure where your time goes by time logging or activity sampling. Use your secretary to assist you.
- Analyse results - when is your prime time?
- Identify problems.
- Allocate time to jobs & monitor progress.

→ If you are wasting time, admit it & correct it.

→ Divide your salary + overheads by your annual hours = a guide to the cost of your time.

PERSONAL INCAPACITY

- Too tired.
- Physically unfit.
- Too stressed.
- Doing too much already.

- Look to your working hours & reduce them.
- Look to your diet & eating habits.
- Don't drink / smoke to excess.
- Practice relaxation techniques.
- Try to get adequate/proper sleep.
- Can you commute less / more easily? → Try 'flexitime'.

LACK OF PLANNING

- Always 'fire-fighting' or crisis management
- Juggling too many activities at once.
- Too many meetings (SHEET 2)

'Why must it be you?'

PLAN

- Schedule time with your boss to discuss .....
  - His/her objectives,
  - Your objectives.
- Schedule tasks to do,
- Dates to do them,
- Time to complete them,
- Buffer time for unexpected activities,
- Get others to do likewise.

TOO LITTLE DELEGATION

- Too few persons available.
- Others are untrained or incompetent.
- Don't know how to?

(See Outlines 4.07 & 8.16)

PERSONAL INCOMPETENCE

- Doing un-necessary jobs
- Doing someone else's jobs
- No time to listen
- Takes hasty decisions
- Blames others for his faults.
- Procrastinating.

- Refuse unimportant jobs.
- Ignore irrelevant things.
- Handle mail once only, etc.

- Ask your secretary's opinion.
- Always appears busy ..... "ACTIVITY" v. "ACTION" (See 8.36)

- Problems re-appear & don't go away .... "URGENCY" v. "IMPORTANCE" (See 8.36)

PERSONALLY DISORGANISED

- Unable to say 'NO'
- Permits too many interruptions
- Jobs left unfinished
- Lacking self-discipline

- Be assertive but firm & polite when turning away work.
- See SHEET 2.
- Do that job now & don't stop until it is finished.
- Plan to do one unpleasant job/day, probably in the morning.

Clear your desk leaving only .... a list of objectives; today's plan; current activities. Ask '....how much time will this need?'

See Outlines.....
4.07 & 8.16 on 'DELEGATION'
8.36 on 'SELF MANAGEMENT'

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LOOKING TO SAVE TIME 2 (of 2)

✳ 'EXTERNAL' TIME WASTING FACTORS

- Poor organisation (by others)
- Incomplete information to do task
- Interruptions
- Meetings
- Telephone calls
- Social activities

POOR ORGANISATION
- Too many bureaucratic procedures.
- Someone bypassing / not observing procedures &/or protocol
- Overoptimistic schedules
- Too many persons to supervise.
- Too much paperwork.

→ Discuss with your boss &/or colleagues :-
- How WE are mis-using time.
- Your intention to utilise it better
- How they could help you do it
- Encourage & train subordinates to take decisions.
- Delegate others to deal with WHOLE problems
- How correct procedure observance should save time.

INCOMPLETE INFORMATION
- Not enough information.
- Not in time.
- No authority to act.
- Objectives unclear.

- Be assertive.
- Check your/others' role.
- Get the information.
- Explain your position
- Delegate (if possible).

INTERRUPTIONS
- By your boss delegating, checking, chatting.
- By colleagues delegating, chatting, seeking help.
- By subordinates chatting, seeking help.
- By outsiders for various reasons.
- By telephone callers.
- Of others, while you are with them

If prolonged.....
- leave a note & retire,
- call back later.

AVOIDING INTERRUPTIONS
- Go somewhere you will not be interrupted.
- Introduce your secretary as someone 'qualified to deal with this' & leave them.
- Programme time as 'interruption-free' & publicise it.
- Be prepared to say 'No!'; close your door; but say why you do this.
- Ask casual visitors to call again & make appointments stating ..... time, subject matter, duration, etc.
- Delegate people to deal with expected interruptions.
- Break large jobs into parts to accommodate interruptions.

SOCIAL ACTIVITIES
- Coffee breaks.
- Dropping-in.
- Long lunches.
- Business lunches.

- Bore them with your ideas on time saving.
- Think of your figure & avoid them.
- Delegate someone else the pleasure of an unwanted business lunch if you suspect the motives behind it.
- Tell others of your 'appointment system' & how it works.

MEETINGS
- Too many meetings.
- Unscheduled meetings.

- Don't go!
- Arrange for a deputy to attend.
- Only attend for 'your' item(s).
- Insist on an agenda, know the objectives & the time of starting & finishing.
- Avoid 'open-ended' meetings.

TELEPHONE CALLS
"URGENT" v. "IMPORTANT"
- Should be 'screened' by your secretary.
- If without a secretary, run a 'Buddy System' with colleagues
- If necessary to call back, fix a time for the call & prepare.

- Fix a period NOT to be disturbed.
- Take messages &/or arrange times for calling back.

(See 8.36 Self-Mgt.)

Don't be guilty of wasting others' time. Respect their attempts at better time mgt. as you would have them respect your efforts.

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PRODUCTION OPERATIONS MANAGEMENT (P.O.M.)

- ✳ INTERNAL ENVIRONMENT INTERACTIONS
- ✳ EXTERNAL ENVIRONMENT INTERACTIONS
- ✳ PRODUCTION MANAGEMENT & PRODUCTION ENGINEERING

INTERNAL INTERACTIONS between P.O.M. and the business itself :-
- with MARKETING
- with PRODUCTION development & design
- with FINANCE
- with PERSONNEL

P.O.M. function relates to :-
- other functions within the business,
- parties external to the business,
- specialist groups within the P.O.M. function.

– P.O.M. is the link between the customer & manufacturing upon which production plans are based.

– Has major capacity & skill implications for P.O.M.

– The FINANCE department and production / operations function work together closely in the production & monitoring of budgets & plans.

– To recruit & train staff for the P.O.M. function at many levels.

EXTERNAL INTERACTIONS
Most important are with :-
- Customers
- Suppliers
- Trade Unions
- Shareholders
- The economy

– Through the sales & distribution systems.

– The organisation's performance depends upon its relationship with those who supply materials & services.

– P.O.M. interacts with the national & international economy.

P.M. & P.E.
- **PRODUCTION MANAGEMENT** is a business function which deals with the organisation & use of resources
- **PRODUCTION ENGINEERING** is generally responsible for the design & development of the process technology (Service industries often have no separate engineering function.)

– Managing people, capital assets & costs.

– Managing the tools; equipment; machinery; used in whatever manufacturing or service process is involved.

TRADE UNIONS
P.O.M. will interact with unions at a variety of levels from shopfloor to regional or even national levels.

SHAREHOLDERS
P.O.M. function will have a major impact on the value of any shareholding.

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ROLE OF PRODUCTION/OPERATIONS MANAGEMENT (P.O.M.)

- ✳ SYSTEMS CONCEPT IN P.O.M.
- ✳ THE ORGANISATION OF THE P.O.M. FUNCTION
- ✳ THE ROLE OF THE P.O.M. MANAGER

SYSTEM CONCEPT IN P.O.M.

It implies sets of interconnected functions.....

- a part of the larger external market environment,
- also involving the internal environment of the business itself.
- Another function of P.O.M. sub-systems is evaluation & self-analysis
  - Involving suppliers; shareholders; competitors; customers; creditors; etc.
  - In the hope of improving the total system's performance, reducing duplication, etc. & lowering any resistance to change.

ORG'N OF THE P.O.M. FUNCTION

- The Production/Operations task is a transformation process in which a variety of inputs are transformed into products or services.
- A number of specialist functions support the transformation process
  - EXAMPLES
  - Production Engineering; Production Planning; Production Control; Quality Control; etc.
- Other specialist functions support the 'business process'
  - EXAMPLES
  - Personnel; Accounting & Payment Systems; Marketing; Work structuring; Inventory Control; etc.
- The P.O.M. task directs these special support functions
  - Evaluating the information provided to assist the management function.

ROLE OF PRODUCTION/OPERATIONS MANAGER is a large & complex role to manage the major resources of :-

- People
  - Primarily personnel employed by the organisation.
- Capital
  - Fixed assets, like plant, buildings, equipment.
  - Current assets, like stock & inventory.
- Money/costs
  - P.O.M. is the largest consumer of cash <u>but</u> is also the area where most value is added.
  - Day-to-day activities must be well controlled & co-ordinated to meet the budgeted output.

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PRODUCT/SERVICE PLANNING & INVESTMENT

PRODUCT/SERVICE PLANNING is concerned with establishing the requirements of a product/service in line with given/anticipated market needs.

✳ MAJOR P.O.M. CONSIDERATIONS

- To lead or follow in the market
- R. & D. Process
- Research expenditure
- Analyses of Products & Services

LEAD OR FOLLOW?

- 'Leading' calls for R. & D. planning and investment.
- Involves trade-offs between specification, process capability, market requirements & design (A P.O.M. task)

R. & D. PROCESS

- Strategic programmes require fundamental &/or applied research
- Tactical programmes involve product/service development & launch
  - Concerns designing activities or components to meet customers' needs
  - Cognisant of operational capability & feasibility to make or provide the product/service & the cost. (A P.O.M. task)
- Using alternative materials or processes.
- Adopting & re-designing.
- Finding new uses for existing materials.

ANALYSES OF PRODUCTS & SERVICES

Tactical analyses to reduce costs involve:

- Standardisation of components, materials & process choice
  - Reduces product proliferation & its implication on production/operations management.
- Value engineering & value analysis of the materials & construction process to improve 'suitability for service' & enhance 'use value' & 'esteem value' for customers.
  - May involve increasing material costs to produce net reduction of total manufacturing costs through labour cost gains.

RESEARCH EXPENDITURE

- Awareness is heightened by increasing world competition & reducing product/service life cycles.
- Development & introduction of new products/services is risky & costly.

P.O.M. role changes at each stage of the product/service life cycle.

- FUNDAMENTAL RESEARCH studies basic cause & effect relationships.
- APPLIED RESEARCH finds solutions to practical problems.

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(P.O.M. = Production/Operations Management)

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MANAGING PROJECTS

- ✳ WHAT IS PROJECT MANAGEMENT ?
- ✳ ORGANISATION
- ✳ OUTLINE THE PROJECT

PROJECT MANAGEMENT is the planning & controlling of the project activities to ensure goals (objectives) are achieved on time & within budget. Involves :-
- Organisation
- Planning → What ; when ; how ; how much ; ? etc.
- Control

WHAT IS A PROJECT ? A set of activities linked together over a period of time which are carried out to produce specific goals

ORGANISATION

Separates the 'doers' from the 'directors'. It defines :-
- Roles.
- Responsibilities → Of the project board.
- Reporting structures.

PROJECT OUTLINE comprises :-
- Feasibility Stage
- Assessment
- Planning Stage
- Assessment
- Action Stage
- Assessment

→ **ASSESSMENT** - to see if the (staged) objectives have been achieved before moving to the next stage. Check that everyone is consulted, agrees with the plan & is committed to goals. (Control is maintained.)

- → **TECHNICAL CRITERIA** – will it work?
- → **BUSINESS CRITERIA** – are costs & time scales right ? Is the return big enough to justify the risk involved ?
- → **FUNCTIONAL CRITERIA** – will we end up with something we want to have ? Is it something we want / ought to do ?

✳ FEASIBILITY STAGE →
- What does the 'customer' want ?
- What are you going to do ? → – Outline objectives ; time scales ; costs ; benefits ; etc.
- Check the 3 project criteria :-
  - Technical criteria
  - Business criteria
  - Functional criteria
- If criteria are not met ____ → – Do we continue ?
  – Do we stop ?
  – Do we re-think ?

✳ PLANNING STAGE

To control the project we need :-
- The RESOURCE plan → – Shows skills required ; people needed ; resources required ; etc.
- The ACTIVITY plan → – Time scales with resulting physical end products for each stage to be ready for assessment. Use mechanical control devices like activity networks ; bar charts ; Gantt charts ; cash flow budgets ; etc.

to identify possible snags &/or omissions. Best to have written plans which can be studied & questioned.

Comprises :
- Master plan
- Stage plans
- Detailed plans → Individual work plans for project leader, team leaders, etc.

✳ ACTIVITY STAGE

- Actions individuals' work plans.
- Control meetings take place regularly to review progress & sort out minor problems.

(Control will be more effective if the project is divided into short manageable chunks or stages.)

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PRODUCTIVITY

* WHY MEASURE PRODUCTIVITY ?
* DIFFICULTIES IN MEASURING PRODUCTIVITY
* TOTAL PRODUCTIVITY MEASURES
* IMPROVING PRODUCTIVITY

WHY MEASURE PRODUCTIVITY ?

- OBJECTIVES - to measure organisational effectiveness against agreed objectives
- STRATEGIC - to monitor current performance to assess strengths & weaknesses
- TACTICAL - as a basis for wage/pay negotiations or to compare different process, input/output mixes

PRODUCTIVITY expressed as ratio $\frac{\text{OUTPUTS}}{\text{INPUTS}}$ is difficult both to explain and to measure accurately and scientifically. EFFICIENCY is found by comparing $\frac{\text{Actual outputs (perf}^{\text{ce}}\text{)}}{\text{Expected outputs (perf}^{\text{ce}}\text{)}}$

Could use total productivity measures like:
- output / employee,
- output / labour hour,
- output / per £ wage.
- net profit / £ sale,
- Return on investment, etc

- Useful to compare with similar organisations or competitors & develop appropriate organisational strategies in finance; marketing; personnel; etc.

DIFFICULTIES IN MEASURING

- INPUTS are difficult to measure & their effects on productivity change with time
- OUTPUTS. Product/service mixes & volumes influence input-output comparisons
- Interpretations of results are influenced by external constraints in a changing environment.

PROCESS If productivity or efficiency are the only organisational measures then large batch or line process would predominate but costs of inventory rises & delivery times lengthen.

INPUTS like materials; labour; plant; management skills; etc.

- Volume increases influence process choice.
- Which comparisons are most relevant to make when evaluating performance ?

TOTAL PRODUCTIVITY MEASURES

- 'Added value concept' measures the wealth produced by the organisation in financial terms
- Added value = £(Sales - materials + outside service costs)
- Less affected by factors outside P.O.M. control.
- OK for manufacturing & service industries

- Relates it to total employment costs - measured easily & accurately

- Less relevant to non-profit operations eg. professional caring operations.

$$\text{Added Value Index} = \frac{\text{Total Employment Costs}}{\text{Added value}}$$

IMPROVING PRODUCTIVITY levels within organisations :-

1. Scientific research
2. Technical innovation
3. Operational

- Levels 1 & 2 respond more slowly to increased investment than level 3.
- Product & process design brings long-term productivity improvements.
- New process technology can bring medium-term productivity improvements.
- Short-term productivity results from better use of material & human resources by attention to detail.

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PROCESS CHOICE

- ✳ THE CHOICE OF PROCESS
- ✳ IMPLICATIONS OF PROCESS CHOICE
- ✳ PROFILE ANALYSIS
- ✳ P.O.M. INVOLVEMENT

THE CHOICE OF PROCESS
is between :-
- Project (P)
- Jobbing (Unit or 1-off)(J)
- Batch (B)
- Line (L)
- Continuous process (C.P)

- Machinery is dedicated with possibly linear layout.
- Limited variations in design.
- Less common in service industries.
- High volume throughput.
- Dedicated plant.
- Costly to stop & re-start.

IMPLICATIONS OF PROCESS CHOICE
- Organisations may use different processes in separate parts of their premises
- 'Make to order'
- 'Make to stock'
- Speedy coping with innovation or new developments

- Some hybrid processes have developed to meet particular needs, eg.
  - part batch-part line,
  - part jobbing-part batch.
- Favours 'Project' & 'Jobbing' processes.
- Company sells capabilities rather than a product.
- Sells on delivery & quality criteria.
- Favours 'Line' & 'Continuous' Processes.
- Product & service highly standardised.
- Sells on price & volume.

- Favoured by 'P' & 'J' processes.

PROFILE ANALYSIS
- Investment in process
- Market characteristics

- Low at the 'P' & 'J' end of the spectrum.
- Higher for 'L' & 'CP' end where high volumes warrant higher investment.
- Organisations match process characteristics with the needs of the marketplace.

What are you selling?
- Product or service?
- 1-offs or bulk?

P.O.M. INVOLVEMENT
- In profile analysis
- Effective utilisation of labour (capability), Quality & delivery
- Effective utilisation of plant
- Inventory control & investment
- Organisational design & structures
- P.O. manager inputs

- Leading to choice of process

ORGANISATION etc. may vary from decentralised entrepreneurial freedoms with the high skill levels of P.&J. ..... to centralised, bureaucratic control of L. & C.P.s.

UTILISATION OF LABOUR etc., a dominant factor in P., J. & B. with long process times & high level labour skills

UTILISATION OF PLANT
Important in L. & C.P. with short process times.
Quality is designed into the process.
Individuals' tasks are de-skilled by technology.

INVENTORY CONTROL & INVESTMENT
P. & J. - high WIP to keep labour utilised, low invest't.
L. & C.P. - WIP minimal with fast turnover to reduce costs, but higher investment levels.

P.&J. - Technological support & advice given.
B.&L. - business & people management inputs.
C.P. - Control by persons with high technological capabilities.

12.21

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MANAGING FOR GOOD PERFORMANCE (in subordinates)

- ✳ SETTING EFFECTIVE GOALS
- ✳ PRAISING GOOD PERFORMANCE
- ✳ REPRIMANDING POOR PERFORMANCE

SETTING GOALS

Picture where you want to reach, what you want to achieve
- Visualise the picture.

- Be specific about the goal (or objective).
  - Where; when; how; etc.
  - Do you have support?
    - From your boss?
    - From your family, team, subordinates, etc.?
  - Believe you will achieve it.
    - Have you the resources to do the job?
- Set performance standards to move towards this goal
  - Model good behaviour & be a good role model to subordinates.
- Write the goal(s) down
  - What are you/others accountable for?
  - What are your/their areas of responsibility?
  - What are the performance standards to be achieved?
  - Give dates by which to be accomplished.
  - Any other details?
- Read & re-read goal(s)
  - Use the list for daily progress checks.
  - Reading them over will build commitment.
- Share the goals with those who will help you reach them
  - eg. subordinates

PRAISING GOOD PERFORMANCE

Study your subordinates & ....
- Notice good behaviour
  - Don't accept the negative.
- Be immediate with praise & mean what you say
  - Unspoken praise does not count nor does it motivate.
- Don't wait only to praise perfection
  - May take too long.
  - Praise progress as well as terminal achievements.
- Be specific
  - Tell them exactly what they did which was right.
- Share your feelings
  - About what they did.
- Encourage them
  - To more good behaviour.
- Touch them
  - To encourage & support.

REPRIMANDING POOR PERFORMANCE

- Let them know they will be reprimanded
  - If performance falls below standard.
- Don't attack them or their personality
  - It only makes subordinates defensive.
- Don't reprimand a learner
  - Offer them redirection when needed or necessary.
- Be immediate
  - Don't brood & 'store up' incidents.
- Be specific
  - They have to know what displeases you.
- Share your feelings
  - Let them see how their poor performance affects you.
- Re-affirmation
  - You're alright (as a person), it's the behaviour which isn't right.
- Touch them
  - To show them your support.

- Try and do better?
- No! There is no 'trying', do better!

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P.O.M. - FACILITIES LAYOUT

* WHY PLAN FACILITY LAYOUTS ?
* PRE-REQUISITE DECISIONS
* CLASSIC FORMS OF LAYOUT
* GROUP TECHNOLOGY

FACILITY LAYOUTS are planned to seek tradeoffs so all aspects of a business can be integrated
- Space, plant, equipment & manpower are used more efficiently
- Customer satisfaction levels are improved.

P.O.M. responsibilities cover production facilities & includes machines; equipment; work places; customer areas; materials storage & the flow of materials and people through the buildings.

- Leading to feasible operating schedules.
- Leading to lower operating costs.

PRE-REQUISITE DECISIONS cover :-
- The product/service mix to be provided.
- Make or buy decisions.
- The process(es) to be used & where.
- Expected levels of demand & materials handling.
- Physical restrictions of the buildings used.
- Need to re-use existing plant & space.

- Changes can be required due to shortening product life cycles; new product mixes; new process designs & work methods.

GROUP TECHNOLOGY
- Seeks to compromise & combine the advantages of low cost line(product) layout with the flexibility of batch (process) layout.
- This process is volume driven.
- Machines / equipment is grouped according to function.
- Product families are grouped and processed in stages.
- Reduces work-in-progress inventory & lead times.

CLASSIC FORMS OF LAYOUT
- Fixed position layouts (P)
- Process layouts (J & B)
- Product layouts (L & CP)

- Due to the size, complexity & immovability of the project, the resources needed are moved to the work. Flexible.
- With wide product/service ranges & larger volume throughput, similar processes are grouped and customers/work is taken to the process operations. Flexible response is possible.
- Encourages specialisation and improves utilisation of capacity eg. banks; supermarkets; light engineering.
- High volume throughputs mean dedicated facilities for producing single, or a limited range of product's. Low flexibility.
- High set-up costs countered by dedicated line cost advantages.

P = Project
J = Jobbing
B = Batch
L = Line
CP = Continuous Process

The corporate choice of process & investment in process technology is necessary to provide the competitive marketing edge but also requires additional infrastructure & systems investment. P.O.M. tasks record these effects & collects factual evidence as a basis of future decisions.

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THE STUDY OF WORK 1 METHOD STUDY

* WHY STUDY WORK METHODS ?
* THE SYSTEMATIC & CRITICAL APPROACH
* SEQUENCE OF ANALYSIS

WHY STUDY WORK? Any procedure is open to improvement.....
- To improve productivity or
- To create better working conditions

WORK STUDY - the systematic exam^n of activities in order to improve the effective use of human & other material resources. [Br. Std 3138] **METHOD STUDY** is the systematic & critical examination of the ways of doing things in order to make improvements.

- By achieving the same end result for lower cost.
- By improving the value of the end result
  - Through improved use of resources;
  - Improved design of equipment;
  - Improved layout of workplace;
  - By economy of human effort & reducing un-necessary fatigue;

  etc.

THE SYSTEMATIC APPROACH has many advantages :-
- ALL activities are considered for a critical scrutiny.
- Permits a choice between alternatives.
- Approaches 'ideal' working methods.
- Recording present methods is a reference point for future use.
- Avoids minor changes which may later be superceded.

SEQUENCE OF ANALYSIS
- Select
- Record
- Examine
- Develop
- Record & re-examine
- Train
- Install
- Maintain

While showing an understanding for the human factors involved.

SELECT For lasting benefit, the work to be studied is where potential returns merit the time investment involved.
What are the organisation's major cost centres?

EXAMINE the facts critically, in sequence, noting exact reasons for each part of the procedure & listing ideas for developing an improved method. What is the procedure's purpose can it be eliminated or simplified. Where / when / who does it?

RECORD & RE-EXAMINE the new method ensuring its total practicality. Seek comments from those who will be involved in operating & or supervising the task.

INSTALL the new method as standard practise. A critical phase requiring acceptance by workers & supervisors to be affected & by top mgt. to approve factors requiring capital expenditure.

RECORD all relevant facts about the present work method. Advantages are :
- aids a systematic approach,
- is an aid to memory,
- promotes detailed examination.

Use standard charting activity symbols, noting also the need for particular skills, aptitudes, etc. necessary to complete the operation.

DEVELOP the most practical & efficient method of doing the work.
Highlight improved alternatives while bearing in mind contingencies.

TRAIN Identify what training / re-training is necessary if new skills are required.

MAINTAIN this practice by periodic checks to monitor progress to prevent possible reversion to former practices & to make adjustments if necessary.

Important aspects of Method Study are:-
- a questioning mind - for fact & not opinions.
- looking for small %age improvements in something large.
- reviewing the work in its total context

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THE STUDY OF WORK 2 WORK MEASUREMENT & CONTROL

WORK MEASUREMENT - the application of techniques designed to establish the time for a qualified worker to carry out a specified job at a defined level of performance.

* WHY MEASURE WORK ?
* KEY STEPS IN MEASURING WORK

WHY MEASURE ? Businesses operate on 2 dimensions money & time. The primary P.O.M. dimension is time.

- OBJECTIVES :-
  - To eliminate ineffective time.
  - To compare alternative methods.
  - To balance workers in a team.
  - To determine a person's workload.
- As a BASIS for :-
  - planning & scheduling work.
  - estimating & costing.
  - labour & labour-cost control.
  - incentive schemes, etc.

KEY STEPS

- Select
- Record
- Analyse
- Measure
- Establish a standard time
- Production studies

Certain basic principles need to be considered

SELECT

- If it is a new job, much basic info" is needed for production planning; scheduling; costing; etc.
- Changes in materials used, operations or methods require a revised time standard.
- If complaints or queries have been raised.
- To investigate plant or equipment utilisation.
- As an input to a methods investigation.
- Where labour costs appear excessive.

- Work measuring techniques should reflect whether the work is/is not repetitive.
- Is the task short & repetitive - use time in minutes & parts of minutes.
- The more accurate the measuring, the more time consuming & costly the procedure.

PRODUCTION STUDIES should be long to ensure the calculations are correct & workers can achieve a reasonable performance.

RECORD all relevant details, standard analysis sheets may be used.

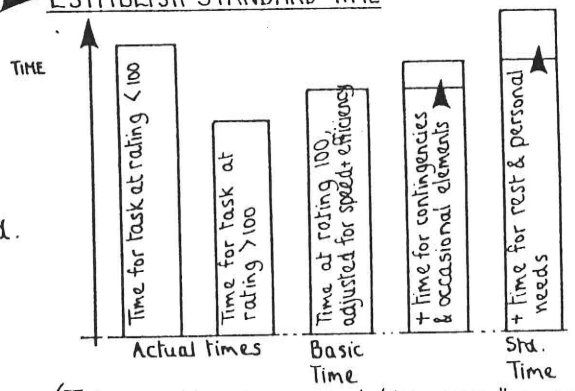
ANALYSE

- Does the job merit dividing into elements?
- Determine the elements which facilitate the measuring process.
- Check the method currently being used.
- Where the task is new, establish a method (agreed) before starting.

MEASURE using 'standard times where they are available, & relevant, for repetitive tasks.

- Determine **BASIC TIMES** plus allowances for 'outside' tasks, rest & personal needs.
- Establish standards for **RATING** purposes from 0 = no work, to 100 = standard performance, and beyond 100 for exemplary performance.

ESTABLISH STANDARD TIME



(To be considered representative, more than one study must be taken.)

* TO CONTROL WORK

Requires :-

- A plan to show mgt. where it ought to go.
- Information to show where it is going.
- Constructive action by mgt. to return to plan.

* CONTROL ACTIONS

Must :-

- Be prompt — Short interval between the event & the control being applied.
- Be relevant — Reporting only on aspects where responsibility & authority permit corrective action to be made.
- Be significant — By being selective between more- & less-important control information.
- Stimulate — Prompt action by comparing 'actuality' with 'planned'.

DAILY work sheets are important working documents for departments, etc., **WEEKLY** reports to middle management need added details of pay & costs, } always looking for trends.

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PRINCIPLES OF PRODUCTION/OPERATIONS PLANNING

- ✳ THE SEARCH FOR 'STABILITY'
- ✳ UNDERLYING CONCEPTS
- ✳ AGGREGATE PLANNING

THE SEARCH FOR 'STABILITY'

- Production needs to be kept at optimum levels
  - Under-production leaves idle resources while incurring overheads
  - Over-production causes queues of work-in-progress & bottlenecks.
- Few organisations (manufacturing or service) can balance demand & production.
- Cushioning production/operations reduces the inherent instability of the market place.

CUSHIONING occurs by using:

- INVENTORY, make-to-stock in anticipation of future sales. Less easy with services which cannot be stored.
- EXCESS CAPACITY, costly to retain. Try to reshape demand to smooth peaks & troughs.
- SHORT-TERM CAPACITY CHANGES, with 'flexible' people working part-time or overtime. 24-hour line/continuous processes allow little scope for capacity changes.
- ORDER BACKLOG, with advance bookings; appointments; sales orders; etc. NOT OK if similar products or services are available elsewhere.
- SYSTEMS & PROCEDURES can be used which allow the organisation to accommodate to market instability.

UNDERLYING CONCEPTS

- Planning vs. Control
  - Two separate functions but interdependent. Planning deals with pre-operations activities Control deals with tasks & decisions made during operating the process.
  - Control follows planning & requires a comparison of actual & planned performance to determine variances & fine-tune the process system into line with plans.
- Improving operational performance
  - Aims to reduce total lead time for producing a good or service by minimising the unproductive elements of lead time (eg. moving; waiting; etc.)
- Reducing lead times
  - 'Lead time' is part of the problem of providing a faster response to the market demands.
  - Component lead times, are they worth reducing if capacity bottlenecks elsewhere are the critical governing factors?

AGGREGATE PLANNING

- Long-term planning provides capacity investment decisions in line with corporate objectives.
- Medium-term aggregate planning adjusts demand & capacity variables within the organisation's control
  - Yet still allowing short-term, fine tuning of the system to remain of manageable proportions.
- Steps in aggregate planning
  - Forecast sales.
  - Make or buy decisions.
  - Aggregate demand for all products/services.
  - Develop aggregate plans in line with objectives (corporate)
  - Select the planning(time) horizon.
  - Select ways to smooth out capacity requirements.
  - Identify ways to modify demands &/or capacity changes.
  - Select the most suitable aggregate plan

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Production of goods/services must NOT be separated from either:

- the markets,
- the control process.

Features of planning & control differ substantially from one process to another.

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PRODUCTION/OPERATIONS CONTROL

- ✳ FACTORS INFLUENCING OPERATIONS CONTROL TASKS
- ✳ PROJECT CONTROL
- ✳ INTERMITTENT SYSTEMS
- ✳ CONTINUOUS SYSTEMS
- ✳ SERVICE SYSTEMS

FACTORS INFLUENCING TASKS
- The choice of process.
- The strategic requirements of the business to be provided.
- The make-or-buy decision.
- The nature, range & volume of the product/service.
- Capacity-demand reconciliation decisions.

Key :-
W.I.P. Work in Progress
M.T.O. Making to Order
M.T.S. Making to Stock
P/O Production/Operations

PROJECT CONTROL
Network Analysis has been developed for complex projects with numerous inter-related activities

NETWORK ANALYSIS a control mechanism.
- A task is stated as a series of activities.
- All must be completed for the task to be finished.
- Activities are shown in the order in which they are to occur.

► STEPS IN NETWORK ANALYSIS
- Planning, & drawing the network.
- Scheduling, adding limiting factors of time; costs; materials; equipment; labour; etc. & redrawing if necessary.
- Controlling, through feedback
  - To ensure adherence to plan (in light of changing circumstances).
  - To prevent 'float' being used up too early making several sets of activities critical.

INTERMITTENT SYSTEMS
- Jobbing
- Batch

JOBBING - with a variable product/order mix, try to ensure correct sequencing without schedule conflict yet keeping W.I.P. inventory & utilising labour efficiently.
- Loading is influenced by :-
  - current & future workloads of skilled persons in the process,
  - recognition of key processes,
  - current order backlog, &
  - delivery requirements of known orders.
- Sequencing, important in terms of delivery & its effect on W.I.P.
- Scheduling, allocates start/finish times to tasks

CONTINUOUS SYSTEMS
Loading & Sequencing are built into line & continuous process systems. Routing is via pre-determined operations.
Scheduling is principally establishing the production rate. Basic P/O task is flow control of raw materials, components & sub-assemblies to the line. (See 'Materials Requirement Planning')

SERVICE SYSTEMS
- Capacity is perishable & not transferable.
- Variability of demand is pronounced.
- P/O Control seeks to re-shape demand to suit capacity provision
  - Demand is a mix of 'planned' & 'random'.
  - 'Random' demand may be re-shaped.
  - 'Planned' demand can be arranged to suit capacity.

► **BATCH**, with a wide range of products/services.
- Loading, M.T.O. (as for Jobbing)
  M.T.S., an accompanying route (job) card guides job through the correct sequences. Key processes need to be monitored to prevent bottlenecks in capacity demand.
- Sequencing, breaks jobs into operations to be completed & allocates them to the process in line with delivery requirements
- Scheduling In complex operations the task is enormous & feedback is slow in coming Plan target monitoring dates to check potential lateness Basic P/O task is order control.

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CAPACITY INVESTMENT DECISIONS (The P.O.M. perspective)

- ✳ THE P.O.M. ROLE ON COSTS
- ✳ CAPACITY PLANNING
- ✳ ECONOMIES OF SCALE
- ✳ MAKE OR BUY ?
- ✳ CAPACITY CONSIDERATIONS
- ✳ DEMAND FORECASTING

P.O.M. ROLE is :-
To manage capacity investment decisions by .....
- Challenging the accounting base
- Checking it is appropriate.
- Ensuring regular re-thinking & updating to reflect reality.

All planning activities take place within the constraints imposed by capacity management decisions. Its objective is to match the level of operations to the level of demand.

→ To understand it better.

CAPACITY PLANNING
- Long-term planning
- Medium-term planning
- Short-term planning

→ **LONG-TERM PLANNING**
- 'Long-term' varies between organisations.
- Should consider how relevant technologies are developing.
- Includes product development & launches in relation to total facilities & plant.

→ **MEDIUM-TERM PLANNING**
- Permits incremental changes to increase capacity.
- Covers training; personnel turnover; capital expenditure; shutdowns; etc.

→ **SHORT-TERM PLANNING**
- Relates to shift patterns; overtime; mechanical maintenance programmes & using subcontractors; etc. based on the production / operations schedule.

ECONOMIES OF SCALE
- Gains derive from :
  - The opportunity to spread fixed costs over a greater number of units.
  - With a small range of products/services non-productive costs will decrease.
  - High volume throughput justifies investment in the process to reduce costs.
- P.O.M. must consider & quantify the following factors :
  - The adequacy of manning & infra-structure levels.
  - The work environment, industrial relations & managing the task issues.

→ Reduces down-time in M.T.O. & M.T.S. processes.

CAPACITY CONSIDERATIONS
- In manufacturing firms, is governed by labour & plant
- In service industries
- P.O.M. perspective

→ Labour - for projects, jobbing & batch.
Plant - for batch, line & continuous process.

→ Identifies 'key processes' within capacity which are the limiting factors on growth (possibly plant &/or personnel).

→ - Services cannot easily be turned into inventory.
- Consumer is the source of capacity.
- Service is provided & consumed in the same time span.

MAKE OR BUY DECISIONS
- Strategic decisions reflect the type of business & the choice of process.
- Tactical decisions consider :
  - internal capability to do the job/provide the service.
  - degree of dependence upon the item.
  - comparative costings.
  - its contribution to overheads.
  - availability of suppliers.
  - requirement for secrecy / protection of ideas.

DEMAND FORECASTING a pre-requisite for capacity planning. Generally :-
- It is difficult & inaccurate
- More general statements are usually more accurate.
- The longer the time period covered the more accurate the statement.

→ The alternative is no forecast at all.

M.T.O. = Made-to-order
M.T.S = Made-to-stock

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DEVELOPMENTS IN MANUFACTURING SYSTEMS

* PROCESS & PROCESS HARDWARE
* P.O.M., SYSTEMS & SOFTWARE

PROCESS & PROCESS HARDWARE

Developed through to/with Computer Aided Manufacture (CAM)

- Mechanisation
- Automation
- Numerical Control (N.C.)
- Robotics
- Computer-aided Design/or Manufacture (CAD/CAM)

- Usually refers to mechanical aids or power-driven devices to replace human effort in part or whole
- Extends mechanisation further & possibly adds inspection & self-correcting adjustment to replace human involvement other than in a remote, controlling function.
- Well established - uses a series of coded mathematical info^{n}/instructions stored on paper, magnetic tape or computer (CNC) to control the mechanical performance of a machine.
- C.A.D./C.A.M. can now aid design in 2 or 3 dimensions, storing designs for future use & rapidly producing printouts & design specifications.
- Robots perform human-type operations, often in highly repetitive tasks or adverse working conditions where human involvement may be dangerous.

P.O.M., SYSTEMS & SOFTWARE

Systems have no intrinsic value & at all times relate to the users.

- Control systems design
- Information & decision systems
- Just-in-Time (JIT.) systems & Kanbans
- Optimised production technology (O.P.T.)
- Materials requirement planning (M.R.P.)
- Manufacturing resource planning (M.R.P. 2.)

- Involves man-machine interfaces.
- Aims to reduce paperwork & processes information for control & reporting purposes.
- P.O.M. must plan the detail of information flow between operations in the production process → Decide the frequency of data sampling to measure performance, etc.
- Information is processed data in a meaningful form for the controller/decision maker.
- Parameter. Relatively constant information.
- Variables. Changeable info^{n} which reflects the current status of the operating system.

M.R.P. 2

- Uses the 'bill of materials', known production route & standard times to forecast mechanical & manpower requirements.
- Optimises the use of resources.

M.R.P.

- Uses product demand to determine material & components demand (Dependent Demand). Ideal for planning materials requirements to produce a 'bill of materials'. A 'planning push' system.

J.I.T.

A successful approach to production control.

- 'Make-to-order' (M.T.O.) not 'Make-to-stock' (M.T.S.) (Demand pull system)
- Production only takes place upon 'instructions to manufacture'
- Suppliers reduce batch size & deliver more frequently.
- Manufacturers reduce batch size → W.I.P. inventory is minimum.
- Aided by lower 'set up' times on machinery → Plan to eliminate bottlenecks & reduce machine down time.
- Small quantities move swiftly through the system.
- Kanban system of inventory control.....this is the order to produce a fixed quantity of a particular item.

- Every manufacturing unit has bottlenecks.
- Time lost at a bottleneck is time lost throughout the plant.
- The key to success is bottleneck management (O.P.T.)

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INVENTORY MANAGEMENT

* WHY HOLD INVENTORY ?
* THE FUNCTION OF INVENTORY
* PRODUCTION/OPERATIONS MANAGEMENT ROLE

WHY HOLD INVENTORY ?

- Raw materials inventory
  - To cater for variability in supply.
  - To benefit from quantity discounts or low market prices
  - As strategic stocks against supply problems.
  - To counter inflation.
  - As a form of investment.
- Work-in-Progress inventory
  - Allows greater flexibility in production schedules.
  - Decouples production stages.
  - Stabilises different output rates from parts of the process.
  - Improves utilisation of plant, process & labour.
- Finished goods inventory
  - Provides off-the-shelf customer service.
  - Uncouples supply of goods from the production process.
  - To cope with seasonal fluctuations in demand.

THE FUNCTION OF INVENTORY

- Pipeline inventory
- Cycle inventory (in lot sizes)
- Buffer inventory
- Capacity related inventory
- Decoupling inventory

At any time, certain parts of inventory may perform more than one function.

PIPELINE INVENTORY, in-process or transit inventory covers delays which can occur at every stage of the system.

CYCLE INVENTORY. Movement of inventory must take place in 'lots'. (How large need these lot sizes be?)

BUFFER INVENTORY. Protects against unpredictable variations in supply. Its size depends upon service levels OR levels of 'stock-out' risk set by management.

DECOUPLING INVENTORY separates dependent parts of the total operation.

CAPACITY RELATED INVENTORY can store present capacity for future use. Covers seasonal fluctuations in demand.

P/O MANAGEMENT ROLE

- Question the need for / cost of holding inventory of every kind at ANY stage in the process.
- Determine acceptable levels of inventory at EVERY stage of the process & keep stocks within upper & lower boundaries.
- Balance the conflict of attitudes to holding inventory by sales/production/accounting, etc.

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Ways to reduce inventory .....

- find standardised items which will replace several others & reduce their stock holdings....
- change to 'Just-in-Time' manufacturing systems.

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INVENTORY CONTROL

- ✳ INFLUENCE OF INVENTORY ON COSTS
- ✳ TYPES OF INVENTORY
- ✳ INVENTORY & PROFITS
- ✳ CONTROL OF INVENTORY
- ✳ PRINCIPLES OF CONTROL SYSTEMS

INFLUENCES will be seen on :-

- Process costs (unit costs)
- Utilisation of Process & People by making-to-stock
- Transfer of capacity to meet peak demands
- Investment costs.

- When set-up times are fixed costs, doubling quantity of throughput halves set-up costs per unit & v.v.
- Smoothes labour & plant set-up costs when demand is low for finished goods.
- In the form of inventory for reasons given above.

The key to Inventory Control is to maximise the utility of inventory while minimising the corresponding investment. Another P.O.M. task.

INFLUENCES cannot be addressed in isolation but must be understood within the context of the whole business & precedes the choice of an inventory control system.

TYPES OF INVENTORY

- Raw materials & components
- Work-in-Progress (W.I.P.)
- Finished goods
- Supplies (Consumables)

- **RAW MATERIALS** - valued at cost, comprise items to which no value has been added by processing.
- **W.I.P.** - valued according to the stage reached - as materials + processing costs to this stage.
- **FINISHED GOODS** - valued at purchase price - is stored ready for sale.

INVENTORY & PROFITS

- During periods of reduced demand a legitimate proportion of costs can be absorbed into inventory hoping to recover the investment when sales pick up.

System	inputs →	Process	outputs →
Inventory	R.M.& C.	W.I.P.	Finished G.

CONTROL OF INVENTORY

- Decide the reason for holding a particular inventory.
- Develop a master plan to achieve required production levels.
- Estimate inventory standards.
- Compare actuals to forecast & analyse variances.
- Review inventory standards.

The corporate perspective commonly gives close scrutiny to fixed asset investment but less scrutiny to inventory investment which may be much higher.

PRINCIPLES OF CONTROL SYSTEMS

- M.R.P. - used finished good demand forecast to 'push' production of good or service
- J.I.T. - uses demand to 'pull' work through the system
- O.P.T. - 'bottleneck' management used to control production

- Requires high investment in inventory & its management.
- Lower investment in inventory & its management.
- Inventory investment lies between above alternatives.

Where demand for 1 item is independent of any other item (spare parts or simple products) simple inventory control systems may operate with 'fixed order' or cyclical replenishment systems, based on time, quantity or discounts.

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QUALITY ASSURANCE (Q.A.)

- ✳ QUESTIONS ON QUALITY ASSURANCE
- ✳ APPROACHES TO CONTROLLING QUALITY
- ✳ POLICY ISSUES ON THE CONTROL OF QUALITY
- ✳ TECHNIQUES LEADING TOWARD TOTAL QUALITY CONTROL (T.Q.C.)

QUESTIONS ON Q.A.
Manufacturing & service industries need to ask :-
- What does the market/customer expect?
- Does the product/service meet this need?
- What is the P.O.M. attitude to Q.A.?
- Is the market/customer satisfied with the 'status quo'?

- How do they perceive quality?
- Are there laid-down systems within the production/operations process?
- Will they accept a lower level of quality?

QUALITY ASSURANCE includes every aspect of quality including Quality Control (Q.C.).

APPROACHES TO CONTROLLING QUALITY in :-
- Projects
- Jobbing
- Batch
- Line
- Continuous Process

- Inspectors inspect at short, fixed intervals but skilled workers take on the responsibility for quality.
- Quality is an important customer requirement so skilled workers take on the major responsibility.
- Responsibility for quality moves to dedicated specialists.
- Quality is built into the process reducing the individual's responsibility for quality.
- The process is designed to provide the required quality.

POLICY ISSUES
Attitudes toward quality control may be :-
- Reactive (detection orientated)
- Proactive (prevention orientated)
- Combined reactive-proactive approaches
- Control system design

- No quality responsibility lies with the (line) operators.
- Inspectors prevent sub-standard work passing to subsequent process stages.
- Provide products/services right first time most of the time.
- Quality is built into the process & inspection procedures are also used.
- Closed-loop feedback systems control quality without relying on inspectors' or operators' skills.

TECHNIQUES LEADING TOWARD T.Q.C.
- Responsibility designation
- Quality Circles
- Easy-to-see quality
- Correcting faults 'on-line'
- Quality purchasing
- Process inspection
- Statistical quality control
- Machine maintenance

RESPONSIBILITY belongs to P.O.M. not just Q.C. inspectors.

QUALITY CIRCLES - initially small scale Q. projects with the ultimate aim of 'zero defects' through ever improving quality.

EASY-TO-SEE Q. Plant managers decide if a Q. problem represents an acceptable risk. Substandard products may be accepted.

'ON-LINE'. When no line disruption is allowed it injects urgency into a search for solutions to quality problems.

QUALITY PURCHASING. Develops links with suppliers so receipt inspection is un-necessary - avoiding duplicating Q.C. procedures. (Requires longer contracts & single sourcing.)

PROCESS INSPECTION as part of the process offers significant benefits eg. predicting the need for tool changes or machine maintenance.

STATISTICAL Q.C. permits measurements between upper & lower levels to be considered satisfactory, otherwise faults are predicted.

MACHINE MAINTENANCE. 'Planned' maintenance rather than 'breakdown' maintenance reduces machine-caused quality problems.

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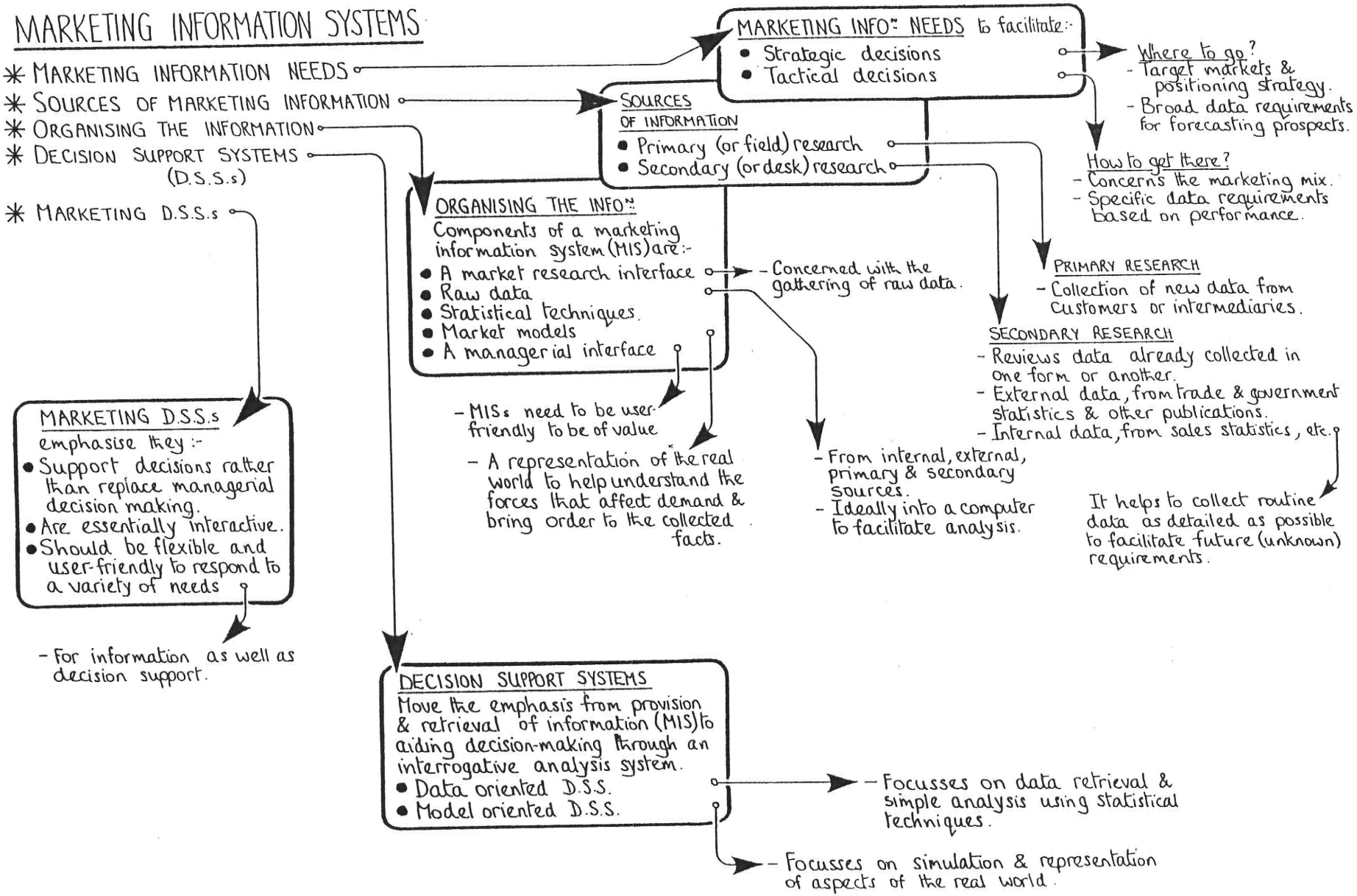
MARKETING INFORMATION SYSTEMS



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MARKETING RESEARCH

* OFF-THE-PEG RESEARCH
* TAILOR-MADE RESEARCH

OFF-THE-PEG RESEARCH
- Secondary (desk) research
- Syndicated research
- Specialist research services
- Shared research

- SECONDARY RESEARCH results are relatively cheap & quick to obtain, reliable & accurate.
- Data is often dated & unspecific to tell 'how many?' customers or 'why?'

SHARED RESEARCH
- Some of the costs of fieldwork are shared but not the results.
- Has advantage of low cost & flexibility to ask limited company-specific questions to a large sample.

SYNDICATED RESEARCH
- A group of research buyers share costs & findings of the research.
- Commonly used in consumer, commodity markets.

SPECIALIST SERVICES
Off-the-peg expertise from individual research agencies.

- Retail audits & consumer panels are continuous research forms used to track performance over time.
- Methodology tried & tested with large samples & cheaper than company research.
- Data does not allow probing of motivations & company-specific questioning.

TAILOR-MADE RESEARCH
Designs research to match the company's needs :-
- Qualitative research
- Quantitative research

QUALITATIVE RESEARCH
for opinions motives & attitudes, a precursor of quantitative research.

TECHNIQUES
- Group discussions → Encourages interaction; value rests on the quality of the group moderator.
- Individual depth interviews
  - 1:1 interviewer to respondent
  - Impossible to employ large samples.

QUANTITATIVE RESEARCH produces numbers.

TECHNIQUES
- Surveys → Personal, telephone or postal.
- Observation → Examples :-
  - Metered TV. Research,
  - Flight recorders,
  - For traffic density,
  - etc.
- Experimentation

Examples :-
- Test marketing,
- Mini test marketing,
- Supermarket panels of shoppers,
- etc.

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DEMAND MEASUREMENT & MARKET ESTIMATION

* DEMAND CONCEPTS
* FACTORS AFFECTING DEMAND
* ESTIMATING MARKET POTENTIAL

DEMAND CONCEPTS The main components are:-
- Potential market
- Available market
- Served market
- Penetrated market

POTENTIAL MARKET is total market that may be interested in the product or service.

AVAILABLE MARKET is the interested market with the means to purchase (see diagram) Answer to covering the **LATENT MARKET** may lie in lower technology solutions to the customers' needs or problems.

SERVED MARKET is actively pursued by the organisation, unlikely to equal the entire available market.

PENETRATED MARKET is actively served by the organisation.

FACTORS AFFECTING DEMAND
- Exogenous factors
- Endogenous factors

ESTIMATING POTENTIAL
- Adjusted industry sales
- Purchase proportion
- Correlative indices
- Surveys of users
- Triangulation

ADJUSTED SALES
- Info. already collected can be adjusted to estimate potential eg. company returns; trade associations; government statistics; etc.

PURCHASE PROPORTION
- Where market info. is not available, marketing research inputs can produce estimates.

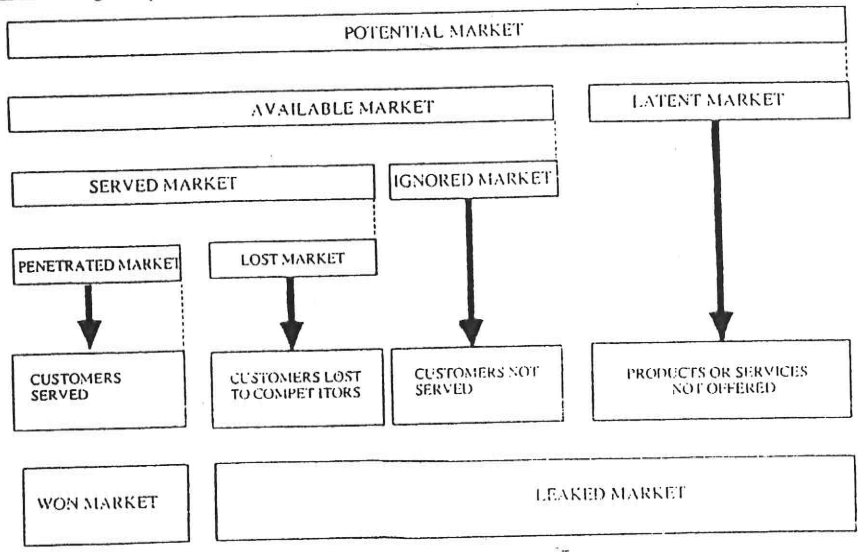
TRIANGULATION
- Uses a variety of methods & data sources. Convergence of results adds credence.

SURVEYS OF USERS
- Primary research on users, levels of usage & changes can be projected to give estimates.

CORRELATIVE INDICES
- For estimates, seek statistics for correlated products or factors, eg. baby food sales : birth rates.

ENDOGENOUS FACTORS are the controllable elements of the marketing mix used to influence product demand. To estimate their effects on sales, methods used include:
- **Judgemental**, depends on the skills & knowledge of executives. Not wholly reliable.
- **Statistical analysis** of sales data, being historical is less reliable in dynamic situations.
- **Surveys**, - proven use in limited areas.
- **Laboratory experiments** - lack realism.
- **Test marketing**, most reliable for estimating price elasticities.

EXOGENOUS FACTORS are outside the influence of the supplier, eg. demographic profiles; government legislation; technological change; competitor activity etc.



* ANALYSING MARKET LEAKAGE

The 'leaked market' is currently not penetrated so investigate reasons for leakage & strategies to plug the leaks.
- Product or service not offered ?
- Customers not served ?
- Lost to competition ?

- Re-examine your product/service.
- Possibly a distribution problem?
- Widen the product/service portfolio.

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FORECASTING FUTURE DEMAND

- ✳ THE FORECASTING HORIZON
- ✳ FORECASTING DATA
- ✳ BASIC FORECASTING TECHNIQUES

OBJECTIVES: To reduce uncertainty in decision-making & help make better decisions based on assumptions of the future. Levels of uncertainty rise as markets become more complex so a variety of techniques is more reliable.

THE HORIZON

- Long-term → For identifying overall trends & strategic decision-making.
- Medium-term → For cyclical patterns & timing new launches & new products.
- Short-term → Identifying seasonal fluctuations, useful for planning production & inventory levels.

FORECASTING DATA

- Commonly longitudinal & historical → Patterns & trends are examined & projected to estimate future levels of variables.
- Cross-sectional data covers a wide breadth but at one point in time. → It may help to explain rather than describe the factor being forecast.

BASIC TECHNIQUES

- Qualitative methods
- Time series analysis
- Causal analysis

CAUSAL ANALYSIS

constructs causal models to concentrate on explaining & not just on describing & projecting patterns. Used to forecast turning points. Uses regression models; input-output models; econometric models; etc.

TIME SERIES ANALYSIS

Uses historical data which is relatively clear & stable after distorting factors are removed. Better for short-term forecasts. Uses moving averages; exponential smoothing; Box-Jenkins; X-11 techniques & trend projections.

QUALITATIVE METHODS

used when data is scarce:-

- Delphi model → **DELPHI MODEL**
  - A panel of experts responds (individually) to questionaires.
  - Estimates are revised, circulated to experts & re-submitted until.....
  - Forecasts converge & crystallise.
  - Panel members identity remains secret.
  - Technique only as good as the panel members.
- Market research → **MARKET RESEARCH**
  - Used qualitatively collects buyer intentions to estimate take-off rates & market shares.
- Panel consensus → **PANEL CONCENSUS**
  - Uses panel of experts, but without the Delphi 'secrecy'.
  - Forecasts susceptible to bias of influential members.
- Visionary forecast → **VISIONARY FORECASTS**
  - Uses subjective guesswork & imagination & is not recommended.
- Historical analogy → **HISTORICAL ANALOGY**
  - Compares new & existing products & assumes a similar pattern will emerge.

- ✳ OTHER FORECASTING
- ✳ NEW PRODUCT FORECASTING

OTHER METHODS

- Environmental forecasting → Predicts social, technical, political, & economic changes using market analysts to collect & interpret data & pass it to decision-makers.
- Industry forecasting → Predicts the competitive environment for the industry.
- Company sales forecasting → Predicts own market share on survey of buyer intentions. Influenced by company policy & competitor activity.

NEW PRODUCT FORECASTING

- Historical analogy → With other launches, etc.
- Concept testing
- Test marketing → For future demand. Problems arise in translating 'enthusiasm' into estimates of actual purchasing.

The most appropriate method depends on the characteristics of the environment facing the company & the extent of the forecasts into the future.

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MARKET SEGMENTATION

* WHY SEGMENT MARKETS ?
* SEGMENTATION

May be achieved using :-
- Customer characteristics
- Attitudinal characteristics
- Behavioural characteristics

WHY SEGMENT MARKETS ?

Where there are differences in preference patterns, there is scope to segment the market.
- Consumer preferences do differ.
- Respondents may be grouped into relatively homogeneous subgroups.
- Differences relate to differences in behaviour.
- Marketers can isolate & target meaningful segments.

BENEFITS OF SEGMENT

- A useful approach by smaller companies to create a niche
- It identifies gaps un- or under-served for new product dev't.
- Identifies segments still in growth in mature or declining markets.
- Strengthens your competitive position by matching product closely to the target market.
- Dangerous not to do so if your competitors are doing it!

CUSTOMER CHARACTERISTICS

- Demographic
- Socio-economic
- Personality
- Lifestyle

Too general in nature to be of great value in most markets.

DEMOGRAPHIC

· Age ; sex ; geographical ; family life cycle ; cultural ; etc.
· Generally low levels of correlation between behaviour & demographic characteristics.

SOCIO-ECONOMIC

· Income ; occupation ; social class ; terminal education ; etc.
· Are becoming less discriminating as variables.

PERSONALITY

· Inferred from sets of questions, but are less valuable than other variables.

LIFE STYLE

The three main elements are :-
· Activities,
· Interaction with others,
· Opinions.

Useful guides to the content of advertising.

BEHAVIOURAL CHARACTERISTICS

Segments based on how consumers behave :
- Purchase behaviour
- Consumption behaviour
- Communication behaviour
- Response to the marketing mix.

· Here 'opinion leaders' give info" but 'info" seeking' behaviour may show an attractive segment at which to target a promotion.

· Purchasers are not necessarily the consumers or users.
· Product & brand usage is a popular segmentation basis.

· Centres around time & patterns of purchase in the product life cycle, eg. brand loyalty

ATTITUDINAL CHARACTERISTICS

attempts to link customer characteristics & marketing behaviour – a more useful basis for a marketing strategy.
- Benefit segmentation
- Perceptions & preferences

· How do respondents view the products or services ?
· Which do they prefer ?
· What benefits are customers seeking ?

* SEGMENTING INDUSTRIAL MARKETS

Main characteristics are :-
- Company background → Considers first-stage variables → · Number of employees, · Turnover, · Geographical location, · S.I.C., · etc.
- Attitudinal → Emphasise selling 'benefits' rather than 'features'.
- Behavioural → '80:20 Rule' predominates so consider 'volume purchased'.

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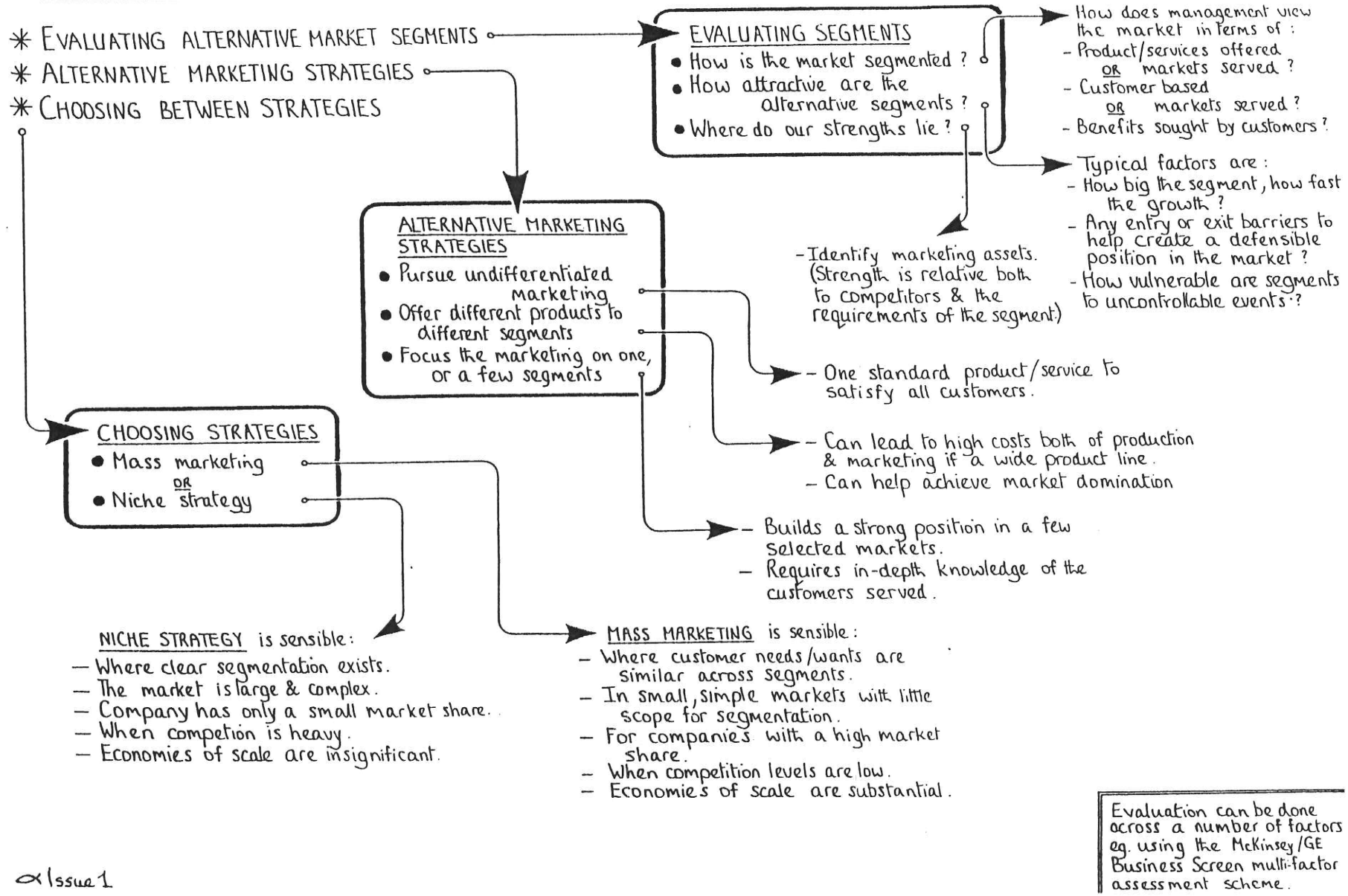
MARKET TARGETING



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PRODUCT & SERVICE POSITIONING

* IDENTIFYING CURRENT MARKET POSITION
* CREATING A PERCEPTUAL MAP
* IMPROVING PRODUCT/SERVICE POSITIONING

IDENTIFYING MARKET POSITION uses either :-

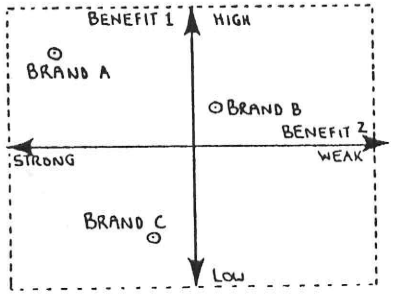
- Qualitative research, or.... → Techniques like group discussion & interviews.
- Quantitative research → Uses attitude scales such as the 'semantic differential'.
- More recent methods are multidimensional scaling techniques → Outcomes are 'perceptual' or 'brand maps'.

CREATING A PERCEPTUAL OR BRAND MAP Can be used in profit & non-profit making sectors to compare products/services with (potential) customer needs or wants.

Stage I - identify the most important product/benefits sought by clients

Stage II - use structured interviews to consider attributes of your competitor set & position them

Draw them →



Question :- Are we where we want to be?

Question :- Segment 4 is empty (unserved), would it be potentially profitable to position a product/service there?

IMPROVING POSITIONING

The alternatives are :-

- No change → **NO CHANGE** - Current position is optimal, no change is sought.
  - OK, for market leaders in static markets
  - not OK, if it leaves company offerings behind as the market develops.
- Image re-positioning → **IMAGE RE-POSN** - When weakness is identified, it entails image change to a more favourable one but no product changes.
- Product improvement → **PRODUCT IMPROVT** - When necessary, prior to re-positioning by gradually upgrading continuously, or radical overhaul & relaunch.
- Product line extension → **PRODUCT LINE EXTN** - When current offerings are well positioned, there may be scope for further products in unserved & potentially profitable segments.
- Innovative repositioning → **INNOVATIVE RE-POSN** - Positions the product on a dimension previously not considered important then makes it important (through Advertising).
- Product deletion → **PRODUCT DELETION** - If a product or image change is not viable or successful.
- Competitor de-positioning → **COMPETITOR DE-POSN** - Create a worse image for your competitor(s).

* EVALUATING & MONITORING CHANGES IN POSITIONING

Changes should be monitored continuously because :-

- Perceptions may change with time.
- The dimensions may change/be changed by competitor activity.

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THE ROLE OF MANAGEMENT ACCOUNTING

* THE NEED FOR COST ACCOUNTING
* THE SCOPE OF MANAGEMENT ACCOUNTING
* DECISION MAKING & MANAGEMENT PROCESSES
* THE CLASSIFICATION OF COSTS

THE NEED FOR COSTS is to :-
- Value stock to calculate profit.
- Analyse the implication of alternative actions prior to decision making
- Measure performance in order to control activities of the organisation.

The Management Accountant's task is to provide information about the cost of various activities within an organisation for control, decision making & other purposes.

SCOPE OF M.A. encompasses :-
- Financial accounting
- Cost accounting
- Management accounting

The provision of accounting information for parties external to the organisation.

The basis of stock valuation - part of profit measurement for external reporting. It has expanded from just the identification & measurement of product costs for internal use to provision of relevant financial info^n. for managerial purposes.

"....to assist... the formulation of policies & in planning & control of operations.." (C.I.M.A.)

D.M. & MANAGEMENT PROCESSES
- Costing information is valueless unless it leads to better informed decisions.
- Mgt. accounting plays an important role in Drucker's 5 functions of management
- In the 7-stage d-m process info^n. feeds back to earlier stages

DRUCKER (1974)
Planning; Controlling; Organising; Communicating & Motivating.

7-stage decision-making process

Planning
- identify objectives
- seek alternative actions
- gather information
- make decisions
- implement decisions

Control
- compare outcomes with plan
- respond to divergencies

Accounting Info^n.

CLASSIFICATION OF COSTS The key phrase is 'relevance for its purpose' - no single best classification stands out.
- Costs for stock valuation
- Costs for decision making
- Costs for control

Product costs are identified with stocks of goods & are included in their valuation. **Period costs** are not included & are treated as expenses for the period they were incurred.

- Identifies & apportions costs to 'responsibility centres' who further divide costs into....
  - controlled by them, &
  - not controlled by them.

Cost accounting accumulates past costs to affect decisions or anticipated costs & revenues. **RELEVANT** costs depend upon a particular decision which may be changed by it.
- Cost behaviour → Examines how costs vary with different levels of activity
- Sunk costs
- Opportunity costs
- Marginal costs

VARIABLE costs may vary in proportion to activity level. **FIXED** costs may not. These costs are relevant.

Incremental costs which may result from (say) a change in production volume - are relevant.

Values resources which are switched from one use to another & values the best alternative use - are relevant.

Have already been incurred & are unaffected by any new decision - not a relevant cost.

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ATTRIBUTES OF ORGANISATION

* THE FORMAL ORGANISATION
* DIVISION OF LABOUR
* LINE & STAFF
* COMPLEXITY
* ORGANISATIONAL ENVIRONMENTS
* STRUCTURAL FORMS

FORMAL ORGANISATION

- A hierarchical, differentiated system of inter-related groups & roles
- Usually represented by an organisational chart showing chains (lines) of command
- Top management
- Middle management
- Supervisory management

- From Chief Executive to shop floor.
- Showing the extent & manner of the division of labour, & the nature of coordinating mechanisms.
- TOP MGT., responsible for developing & reviewing strategic plans & policy.
- MID. MGT., implements policy by developing intermediate plans. Establishes departmental policies & reviews.
- SUP. MGT., develops & implements short-range operating plans & supervises day-to-day operations.

DIVISION OF LABOUR

- Requires specialisation of tasks & roles..... accompanied by
- Coordination

COORDINATION & integration of its various parts eg. by direct supervision - usually through the chain of command.
- Each employee has only one supervisor.
- Spans of control differ according to level within the hierarchy.

SPECIALISATION depending upon the nature of:
- the task,
- the technology,
- the people involved.

LINE & STAFF

Three types of authority exist:-
- Line authority
- Staff authority
- Functional authority

FUNCTIONAL authority by virtue of one's specialism & hierarchical position. (More related to 'STAFF')

LINE authority, between superior & subordinate. Flows are simple & directly related to chain- & unity-of command.

STAFF authority, is advisory in nature for the line manager. Many are there to monitor line activities eg. service staff, accounts, etc.

COMPLEXITY

- Arises from dividing work & creating functional departments
- It increases with reduced spans of control, specialisation & departmentalisation.

ie. 'differentiation'.
- Horizontal diff'n refers to the number of units at a given level.
- Vertical diff'n refers to the number of levels in the organisation.

ENVIRONMENTS

- General - offers little choice
- Specific - offers broad choice

GENERAL ENVIRONMENT is the cultural, legal, economic, political & educational condition(s) affecting the organisation.

SPECIFIC ENVIRONMENT covers suppliers, distributors, competitors, customers, etc. with which the organisation interacts.

STRUCTURAL FORMS

Common structures are:-
- Simple
- Functional
- Divisional
- Conglomerate

- Generally 'flat', with almost everyone reporting to one individual.
- Fast & flexible comm^{ns}.; accountability is clear.
- Suited to small org^{ns}. in formative stages.

- Groups similar & related occupational specialities.
- Gives economies of scale; reduces duplication.
- Suited to smaller org^{ns}. with single products/services.

- No important interdependencies except the pooling of financial resources.

- Autonomous divisions (within given parameters).
- This format spreads the risk from poorly performing div's.

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ORGANISATIONS - POWER & THE POLITICAL CONTEXT

* ORGANISATIONS AS POLITICAL SYSTEMS
* INTEREST GROUP BEHAVIOUR
* SOURCES OF POWER

POLITICAL SYSTEMS - viewed as such they are concerned with dispensation of power.

- **AUTHORITY** - a special kind of power
- A **POWERFUL** person can influence another's conduct

– Usually by right or position when relations are legitimate.
– Actions are in line with role;
– Authority relations are always consensual.

– Influence, is the behavioural response to the exercise of power.
– Its use is ultimately coercive.
– Appropriate when – situations are changing;
– legitimacy is not clear;
– you control resources, information, etc.

POWER is the ability of people to make others do their will, voluntarily or otherwise.

INTEREST GROUP BEHAVIOUR Political behaviour results in the formation of interest groups :-

- Cabals
- Cliques

– Upwardly mobile persons who restructure the political situation in their own interests.
– Whose objectives are defensive of their members' interests.

SOURCES OF POWER

- **NORMATIVE**, based on legitimacy & coincides with authority.
- **UTILITARIAN** power, relates to the payment of inducements.
- **COERCIVE** power, arises through the control of rewards/sanctions

– Since managers are dependent on others that they do not control, they are vulnerable & need to develop skills in managing & using power.

* CHARACTER OF ORGANISATIONAL POLITICS
* RELATIONSHIPS BETWEEN POLITICS & STRUCTURE

Ambiguous formal roles & authority invites internal political competition.

- Offensive strategy
- Neutral strategy
- Defensive strategy

Reduced by open, democratic, problem-solving styles of organisational behaviour.

– Is power-building, developing loyalties, sabotaging & exploiting others. Often dysfunctional.
– Maintains the status quo.
– If you cannot look good, make others look bad !!

- Mechanistic (bureaucratic) structures
- Organic structures
- Diverse structures

– With many explicit rules & procedures, auditing groups can enforce adherence & relative power is increased.
– In emphasising advisory relations, staff units become powerful with their success in advising line managers.
– Have substantial potential for conflict.

The ultimate function of organisational politics is to allow the power of subunits to fluctuate while the overall structure remains constant.

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ATTRIBUTES OF ORGANISATIONAL CHANGE

* WHY PLANNED CHANGE ?
* SOURCES OF PRESSURE FOR CHANGE
* SOURCES OF RESISTANCE TO CHANGE
* DEPTH OF INTERVENTION

Commonly, organisations can benefit from change long before the need for change is finally recognised. Inertia & 'status quo' thinking leads to resistance to change.

WHY PLANNED CHANGE ?

- To keep the organisation current & viable
- Because org'ns are open systems dependent upon their environment.
- At individual level – to affect employees' behaviour

– Modern environments are dynamic & change continually.

SOURCES OF PRESSURE

- With interdependent subsystems, change in one place often triggers other changes.
- Internal factors having potential to create organisational unrest.
- External factors in the environment (Any number of factors within any category can be active at any one time)

– Change in org'n's goals.
– Incongruety of personal & company goals.
– Presence of innovators & innovations.
– Strikes; rising costs; etc.
– Power conflicts.
– etc.

– Increasing uncertainty.
– Changes in technology.
– Demographic or ecological considerations.
– Ideological & cultural factors.
– etc.

RESISTANCE TO CHANGE

Comes through:-

- Resistance because the change is not worthwhile
- Resistance to the change strategy being adopted
- Resistance to the change agent as a person

– If not open to feedback & consultation.

Minimise resistance by:
– Making apparent the positive relative advantages.
– Show its compatibility with existing values & attitudes.
– Show its lack of complexity.
– Resist experimentation before commitment.

– Attempting change by force or coercion.
– Using strategies perceived as manipulative or insincere.

DEPTH OF INTERVENTION

We can envisage:-

- Shallow change strategies
- Deep change strategies
  - Which strategy? –

– More formal & public attempts to change ideas; technologies; etc. eg. to adopt cognitive & rational problem-solving techniques.

Attempts to change an individual's values uses:
– Industrial psychology like job enrichment, etc.
– Managers are helped to alter their styles, attitudes, social orientation & work behaviour.

– Intrapersonal analysis incorporating psychoanalysis.
– Training in interpersonal relations to affect feelings, attitudes & perceptions about one another.

Emotions, values & attitudes are not developed rationally or logically so are unlikely to be altered by appeals to logic or reason.

WHICH?
Depends upon the depth to which one must go to achieve organisational change. Also the level of intervention that is available.

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ORGANISATIONAL CHANGE STRATEGIES

- ✳ LEWIN'S VIEW OF CHANGE PROCESSES
- ✳ UNFREEZING BEHAVIOUR
- ✳ RESHAPING THE FORCE FIELD
- ✳ REFREEZING BEHAVIOUR

LEWIN'S VIEW simplifies to an 'unfreezing - change - refreezing' process.

- An individual's behaviour is the result of a balance of 'forces'
- Social forces & group norms combined produce social equilibrium.
- Behaviour changes come from reshaping the 'force field'.

– Some behaviour is perceived as rewarded, other behaviour punished.

UNFREEZING BEHAVIOUR

- Increase driving forces
- Decrease restraining forces
- A combination of the above.
- Using change agents.

– Through manipulation of positive & negative incentives

– Less effort needed to reduce restraining forces than to increase other forces. Also more controllable & a psychologically healthy move by management.

RESHAPING THE FORCE FIELD thro'

- Education & communication
- Participation in the change decision.
- Facilitation & support to reduce fear & anxiety.
- Negotiation
- Manipulation & co-option
- Coercion

– Assumes the source of resistance lies in poor communication or misinformation.

– Where resistance comes from a powerful source.

– Possibly covert influence attempts.

– 'Buy off' leaders with key roles in the change decision to get endorsement.

– By threat or force upon the resisters.

REFREEZING BEHAVIOUR

To prevent reversion to the equilibrium which existed :-

- Formalise the new driving or restraining forces
- Make the change permanent

– With formal rules & regulations to reinforce the new state.

– The reward allocation system must not fall short of expectations.
– Continued support necessary from a suitable sponsor.
– Let people know what is expected.
– To accept & sanction change, group forces need to gel.
– Commitment must be strong.
– Diffuse the change to more units-increases legitimacy.

(O.D.) Organisational Development.

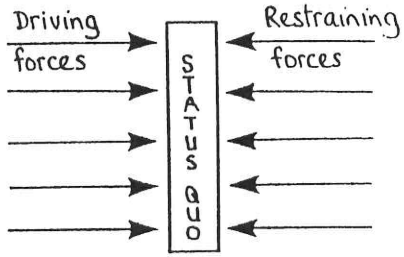
A group problem-solving process intended to bring about planned change to improve the effectiveness of the entire culture of the organisation.

Process Consultation

Helps the organisation by :-

- Involving the client with the consultant in joint diagnosis.
- Making the organisation aware of org'nal processes.
- Learning comes through this self-diagnosis & self-intervention.

'FORCE FIELD' CONCEPT



quasi-stationary equilibrium

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INFLUENCING CHANGE IN CORPORATE CULTURE

[C.C. = Culture Change]

* IDENTIFYING ELEMENTS OF CORPORATE CULTURE
* WHY CHANGE A CULTURE
* GETTING PEOPLE TO CHANGE
* CHECKING FOR CHANGE

IDENTIFYING ELEMENTS

- What is the background of the organisation's founders & those who followed ?
- How does the organisation respond to crises or critical events ?
- Who are considered deviant in this culture ?

First decipher the culture by observing & distilling the content from its many manifestations. Observers must empathise with those they study to understand it on their terms.

- Gives clues to the contents of culture.
- Gives clues to :-
  - how assumptions were formed,
  - the ordering of cultural assumptions,
  - how did it choose between assumptions ?
- Such persons define a culture's boundaries. What is NOT done, said, seen, felt, or is missing, is as important as what is seen & observed to be manifested.

WHY CHANGE ?

- Evidence may show new assumptions to have greater merit than existing ones.
- The organisation's environment may pose problems which require that cultural re-appraisal take place → EXAMPLES :- Modernisation; new technologies; etc.
- The acquisition of new knowledge, skills or competences requires new behaviours.

(Change may be facilitated through the pressure of change agents.)

- In accordance with the new assumptions.
- Persons designated the task of influencing C.C.

GETTING PEOPLE TO CHANGE

- First change their behaviour
- Change agent(s) should minimise the use of rewards or punishments to change behaviour
- Persuade people to unlearn
- Offer people a 'way out'
- Use explicit communications to extol new patters of belief & values

- This happens best by 'intrinsic' motivation, people want to change - "...we want to do it!"
- They would rationalise change in terms of external justification "... we had to do it.... ... for the incentives."
- At least to question current patterns of beliefs or behaviour to see it's unreality vis-a-vis current practice or circumstances. Disconfirmation is hard to generate.

Culture is shared mainly in the minds of organisational members. Change is difficult to monitor & slow in coming. Behaviour change alone is not significant.

- Adds credibility to the need for C.C. & helps internalisation.
- To leave the organisation, or transfer elsewhere.
- Painlessly weeds out those least willing to change.
- Those remaining find it hard to justify opposition to C.C.
- Choice builds commitment.

CHECKING FOR CHANGE

- Is there evidence of intrinsically motivated behaviour ?
- How do they react in a crisis ?

- Does it persist without rewards; punishments; leadership changes; etc.
- Hopefully they would react automatically as appropriate to the new desired culture.

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THE VALUE OF CORPORATE HISTORY

- ✳ HOW TO START A CORPORATE HISTORY
- ✳ WHY HAVE THEM ?
- ✳ WHY ARE THERE SO FEW BUSINESS/ CORPORATE HISTORIES

CORPORATE HISTORY –
- A documentation of historical problems & achievements.
- An uncritical review of corporate structure & strategy.

STARTING A CORPORATE HISTORY

- Have a programme of active record management.
- Hire a professional writer/historian → To place your company in a broad context.
- Respect the historian's integrity → Have contractual terms of reference but exercise minimal editorial control.
- Seek a publisher's advice → For details of cost, readership & format.
- Form an advisory committee.

WHY HAVE THEM ? They are :-

- A useful internal document to inform company management in a frank & thorough manner.
- A management tool → Recognisable patterns of corporate behaviour may have a bearing on the complexities of present corporate planning.
- Not necessarily written for broad public consumption.
- Creating an awareness of the company's evolution → Also a Public Relations tool.
- A contribution to building 'corporate culture'
- Facilitating the work of company lawyers. → Provides a context for present & future strategy.
- Source materials for company marketers & advertisers
- Legitimising present social & political demands. → For company product or image marketing.
- Increasing awareness of business' role as creator of wealth & employment.

WHY SO FEW ?

- Fear they may be used in protracted labour disputes.
- History is not 'practical', it does not produce 'results' or augment the 'bottom line' → There is a cost related to the historical research & publication.
- Could give away track secrets to competitors.
- Could be used by consumer activists, ideologues or investigators.
- May be politically sensitive to show possible foreign ownership.
- Ignorance of their value, role & potential contribution → Making the corporate past work for the corporate future.

Business histories should reflect all levels of business attainment - failures & successes.

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STRATEGIC THINKING & PLANNING (1 of 2)

S.T. = Strategic Thinking
S.B.U. = Strategic Business Unit

* WHAT IS STRATEGIC THINKING ?
* EARLY PROBLEMS OF STRATEGIC PLANNING
* EFFECTIVE STRATEGIC PLANNING

WHAT IS S.T. ?

- The essence of S.T. for a manufacturing/service organisation is to create a sustainable competitive advantage.
- It requires a creative act of synthesis & choice.
- In S.T., managers must overcome their fear of being different & dare to succeed
- For corporate org'ns it requires the detailed consideration of S.B.U.s within the corporate portfolio

→ Encouraged by those who evaluate & reward them.

→ CONSIDERING S.B.U.s
It is not enough to consider just their current & potential earning capacity to prevent imbalance.

PROBLEMS OF STRATEGIC PLANNING In early years.....

- Planning did not promote thinking due to being too formalised with set guidelines → Thinking is strategy.
- Line managers were absent from planning activities → Line managers from sales; marketing; manufacturing; etc. offer credibility & expertise which 'planners' may lack.
- Too pre-occupied with single issues → SINGLE ISSUE PREOCCUPATION
  Planners believed the solution lay in nurturing corporate culture or in quality or portfolio planning or manufacturing or entrepreneurship or ..... etc
- Planning was separated from implementation.
- Too many forms; too much communication; over-reliance on data collection → Large volumes of bumf were generated which confused rather than clarified issues.

EFFECTIVE STRATEGIC PLANNING

Uses a proper process which....

- Does not separate planning & implementation. → S.T. is a year-round activity NOT a once-a-year routine.
- Does monitor & note an org'n's day-to-day activities → Examples ..... price setting; delivery schedules; designing marketing materials; etc.
- Does involve line managers to increase their commitment to planning & its implementation → Not just 'head office' staff though they still have a role to play.
- Does require planners to be facilitators & integrators too → Line managers on rotation can be exceptionally valuable as their perception & experience widens.
- Has fewer set guidelines → Specifies the type of information required but leaves its presentation to the line manager.
- Addresses & integrates multiple issues.
- Requires the services of a good general manager → To offer leadership trade-offs.
  To debate & resolve issues.

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THE ORGANISATIONAL ENVIRONMENT

- ✳ DEFINING THE ENVIRONMENT
- ✳ ENVIRONMENTAL UNCERTAINTY
- ✳ PROPOSED ENVIRONMENTS

DEFINING THE ENVIRONMENT

- General environment
- Specific environment
- Perceived environment

– Economic, political factors, etc. which may potentially impact upon the organisation.

– Directly relevant to the organisation achieving it goals.
– Critical elements which affect the organisation's effectiveness eg. suppliers, competitors; customers; etc.

– Varies with the domain within which the organisation chooses to operate.

ENVIRONMENTAL UNCERTAINTY

The environment is a critical variable

- Dynamic environments
- Static environments create less uncertainty

– Create uncertainty.

Management's major concern is to reduce uncertainty – possibly through manipulating the organisation's structure.

As offered by Emery & Trist :-

- Placid-randomised
- Placid-clustered
- Disturbed-reactive
- Turbulent-field

TURBULENT-FIELD
- Most dynamic, highly uncertain.
- Change elements increasingly inter-related.
- Organisations must adapt to survive.

PLACID-RANDOMISED
- Least threatening;
- Random demands;
- Changes slowly.

PLACID-CLUSTERED
- Changes slowly;
- Threats are clustered.

DISTURBED-REACTIVE
- More complex; many competitors seeking similar ends.
- Organisations plan tactical initiatives; calculate others' reactions & evolve counter measures.

- ✳ BOUNDARY ROLES
- ✳ ATTEMPTING TO MANAGE THE ENVIRONMENT
- ✳ MATCHING STRUCTURES & ENVIRONMENT

BOUNDARY ROLES

- Are mechanisms which interface the organisation & its environment & are created to reduce uncertainty posed by dependence on environ't.
- Are occupied by boundary agents to detect dependencies & act to reduce their impact.

MANAGING THE ENVIRON'T

- Intra-organisational strategies
- Inter-organisational strategies
- Domain choice strategy

– Shift the organisation's DOMAIN to align with a more favourable environment eg. divest or diversify.

INTRA-ORGANISATIONAL
Seeks to shield the org'n. from change by :
- Buffering eg. stockpiling.
- Smoothing market demands.
- Forecasting to anticipate any changes.
- Rationing product or service to provide stability.

INTER-ORGANISATIONAL
Seeks to control the elements on which the organisation depends by :
- Negotiating long-term, fixed-price contracts.
- Co-opting/absorbing individuals or companies who threaten their stability.
- Third party soliciting (lobbying). – Advertising.
- Coalescing/forming cartels for joint action.

ORGANISATIONAL STRUCTURES

as seen by Burns & Stalker have at the extremes :-

- Mechanistic structures
- Organic structures

ORGANIC STRUCTURES
- Relatively flexible & adaptive; influence based on expertise; emphasis on lateral communications.
- OK for turbulent environments.

MECHANISTIC STRUCTURES
- High complexity; formalised; centralised; uses programmed behaviours; authority based on position; issues directives for action.
- OK for stable certain environments.

Issue 1

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A

A.I.D.C.A. 9.17
Absenteeism 11.01 ; 11.13
Abuse, of Meetings 11.48 ; 11.49
, Alcohol 11.11 - 11.13
, Drug 11.11 - 11.13
, Substance 11.11 - 11.13
Accounting, Role of Management 12.40
Achieving a Task 9.40
Action Planning 9.41
Activity planning 12.19
Adaptive responses 9.05
Advertisements, Understanding Job 10.07
Advertising 9.18 - 9.21 9.31 ; 9.35
, Agencies 9.35
, copy 9.19
, Classified 9.18 - 9.21
Aggregate planning 12.26
Analysis, Force Field 9.49
, Problem 9.48 ; 9.49
, S T P 9.48
Assets, customer based 11.33
, distribution based 11.33
, Marketing 11.33
Attitudes to learning 10.37
Attributes of Groups 11.29 ; 11.30
, of Organisational Change 12.43
, of Organisations 12.41
Audit procedures, sales 10.21
, Sales 10.21

B

Bargaining 9.01 - 9.03
Barriers to communication 11.42
Batch mgt 12.21 ; 12.27 ; 12.32
Behaviour, Buyer 11.38
, changing 10.36 ; 11.45
, interpersonal 10.40
, Patterns at Meetings 11.47
Bidding 9.01 ; 9.02
Brief, core 12.08 - 12.10
Briefing, Teams 12.08 - 12.10
Bonus schemes 11.23
Boss, Managing your 10.41
Boundary roles 12.50
Business, portfolio planning 11.32
, Strategic Units (SBUs) 11.32
Buy, or make ? 12.28
Buyer Behaviour 11.38
, strength 11.36

C

Campaign, Sales 10.22 ; 10.23
Capacity, Investment Decisions 12.28
, planning 12.28
Career, Counselling 10.01 10.05 ; 11.07
, management 11.07
, Planning 10.02 ; 11.07
Cartharsis 11.09 ; 11.10
Cause-effect diagram 10.19
Change 9.08 ; 9.09 ; 11.26
12.45
, in corporate culture 12.45
, Organisational 12.43 ; 12.44
, resistance to 12.43
, pressure to 12.43
Changing behaviour 10.36
Channels, selling 10.30
Characteristics of leadership 12.12
Choice, Process 12.21
Client counselling 11.09 ; 11.12
Cohesion 11.30
Commission 11.23
Communicating, with market 9.31 - 9.33
Communication 10.46 ; 10.47 ; 10.50
11.41 ; 11.42
, barriers to 11.42
, Defensive 10.49
, dyadic 11.42
, hindering 10.48
, Interpersonal 11.46
, networks 10.46
, non-verbal 11.45
, role of 11.42
, Skills 10.42 - 10.50
, Strategy 11.41
Competitive advantage 11.34
Conditioning 11.17
, responses in comm'ns 11.46
Conflict & Negotiation 9.01 - 9.07
Conflict 9.07
Conflict Management 9.04
Conflict, in I.R. 9.06
, types of 9.04
Conforming 11.28
Consensus, panel 12.36
Consultants, Career 11.07
, Outplacement 11.07
Consumer, buyer decisions 11.38
, Markets & Buyer behaviour 11.38

Content theory 12.05
Continuous process 12.21 12.27 ; 12.32
Contracts FOR Services 11.06
Control, Production/Operations 12.27
, sales ratios 10.23 ; 10.24
, span of 9.14 ; 10.17
Controlling work 12.25
Co-ordination 9.14 ; 10.47
Co-operative advertising 9.32
Core, brief 12.08 - 12.10
, workers 11.04
Corporate Culture 11.17 ; 12.45 ; 12.49
, Influencing Change in 12.45
Corporate History, Value of 12.46
Cost Leadership 11.34
Counselling 10.01 ; 11.09
11.10 ; 11.43
, Career 10.01
, Co- 11.09 ; 11.10
Course directing 10.35
, duties 10.35
Culture change 12.49
, corporate 12.45
, differences 9.36
, fit 12.49
Cushioning production 12.26
Customer, based assets 11.33
, characteristics 12.37
, management 10.08

D

Decision, making 11.27
, support systems 12.33
Decisions, Capacity Investment 12.28
Defensive Communication 10.49
Delegation 12.14
Demand, forecasting 12.28
, measurement 12.35
Design, Organisational 12.49
Development, by Mentoring 12.03 ; 12.04
Development levels, followers 12.06
Direct Selling 9.23
, sales force 10.30
Differentiation, product 11.35
Diffusion of Change 9.08 ; 9.09
Discussions 11.43
Displays 10.42
Dissonance theory 11.38
Distribution based mktg assets 11.33
Diversification 12.47 ; 12.48
Distress 12.11
Division of labour 12.41

Managing conflict 9.04 ; 9.05
, for Good Performance 12.22
, for Wellness 11.14 ; 11.15
, Groups 9.38 ; 11.28
, People 11.28 ; 12.01
, Projects 12.19
, selling 9.24
Managers' role 12.11
, skills 12.01 - 12.15
Manufacturers' Reps 10.30
Manufacturing res.plg. MRP2 12.29
, systems developments 12.29
Market, estimation 12.35
, leakage 12.35
, research 9.33 ; 12.34
, planning 11.32
, Segmentation 12.37
, Targeting 12.38
Marketing, Assets 11.33
, environment 11.37
, Information Systems 12.33
, Management 10.15 - 10.30
11.31 - 11.40 ; 12.33 - 12.39
, mix 11.31
, niche 12.38
, Principles 11.31
, strategies 12.38
,The Nature of 11.31
Markets, Consumer 11.38
Material req't plg (MRP) 12.29 ; 12.31
Measuring, productivity 12.20
, work 12.24 ; 12.25
Media compared 9.21
Meetings 11.47 - 11.50
, behaviour patterns 11.47
, of Minds 11.43
, role of 11.50
, Role of Chairman 11.50
, Use & Abuse of 11.48 ; 11.49
, validity of 11.48
Mentoring, Mgt.Devt thro' 12.03 ; 12.04
Method Study 12.24
Minds, Meeting of 11.43
, Deeper Levels 11.44
, Influencing of 11.45
, subconscious 11.43 - 11.45
, unconscious 11.44
Mirroring 11.45
Motivating Sales Persons 9.29 ; 9.30
Motivation 10.37 ; 11.26 ; 11.25
11.27 ; 12.05
, Principles of 12.05
, to learning 10.37
Motivator, Knowledge as a 11.26

N

Need satisfaction 10.39
Negotiation 9.01 - 9.03
, Industrial 9.03
, procedures 9.01 ; 9.02
Networks, communication 10.46
New, Concepts 11.20
, Ideas 11.19
, Managers 11.19
, Organisations 11.20
, Technology 10.09
, Work Ethics 11.18

O

O.D. 12.44
O.P.T.(opt'd prod tech) 12.29 ; 12.31
Objective setting 9.40
Objectives 10.41 ; 11.26
, personal 10.41
Operations Management 12.16 - 12.32
Organisational, Behaviour 9.10
, Change 12.43
, Design - cultural context 12.49
, Environment 12.50
, markets 11.39 ; 11.40
, politics 12.42
, power 12.42
, rigidity 10.39
, structures 10.17 ; 12.41
12.42 ; 12.50
Organisations, Attributes of 12.41
, Learning about them 11.17
, Power & Politics 12.42
OUTLINES, Writing 10.45
, used as handouts 10.44
Outplacement Consultants 11.07 ; 11.19
Overhead Projector, Using the 10.43

P

Participation, 11.27 ; 11.21
, Improving Employee 11.27
Pay, components of 11.24
Prejudice, & managing people 12.01
Perception 9.10
Perceptual maps, marketing 12.39
Performance 9.38
, Impaired 11.11 - 11.13
, Improving Sales 10.19
, Managing for Good 12.40
, Related Rewards 11.23
Peripheral workers 11.04
Personal audits 10.02
, skills 10.34
Personality traits 12.01
Personnel Skills 10.01 - 10.07
11.01 - 11.30
Philosophy, shop 9.22
Planning, Career 10.02
, Action 9.41
, for quality 10.14
, Strategic 12.47 ; 12.48
Political strategy 12.42
Politics, organisational 12.42
Positioning Products & Services 12.39
Power, organisational 12.42
, sources 12.42
Praising 12.22
Pricing 9.28
, a Service 10.12
, strategies 10.12
Principles of Prod/Ops Planning 12.26
Problem Solving 9.48 ; 9.49
Process, Choice 12.21
, hardware 12.29
, technology 12.23
, Theory 12.05
Product, differentiation 11.35
, Positioning 12.39
, planning 12.18
Production/Oper'ns, Mgt 12.16 - 12.32
, role 12.30
Productivity, 12.20
, sales 10.25
Profit sharing 11.23
Projects 12.21 ; 12.27 ; 12.32
, Managing 12.19
Protoges 12.03 ; 12.04

Q

Quality, Assurance 12.32
, control 12.32
, in Service Industries 10.14
, of Working Life (QWL) 11.18
, managers 9.42 - 9.44
QWL programmes 11.18 ; 11.21