

Organizational Behavior and Leadership Management Essentials



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INTRODUCTION ROADMAP

Many organizations are looking improve their understanding with regards to organizational behavior and leadership, so they can implement/improve current processes for recruitment, training, management and business planning, and as an overall improvement to the structure and quality of the organization.

This document describes the contents of Organizational Behavior and Leadership toolkit.

This guide is designed to answer a lot of the questions that organizational behavior and leadership raises and provides you with useful guides, templates and essential, but simple assessments.

Presentations can be used to educate or be used as the basis for management presentations or when making business cases for implementation. These presentations are packed full of everything you need to know with regards to Organizational Behavior and Leadership.

The supporting documents and assessments will help you identify the areas within your organization that require the most activity in terms of change and improvement, and will enable you to improve your organizations organizational behavior and leadership understanding and knowledge base.

This guide serves to act as a starting point. It will give you a clear path to travel. It is designed to be a valuable source of information and activities.

Organizational Behavior and Leadership toolkit:

- Flows logically;
- Is scalable;
- Provides presentations, templates and documents; and
- Saves you time.

Step 1

Start by reviewing:

- Introduction -Organizational behavior and leadership.

This provides a detailed and comprehensive introduction to Organizational Behavior, Organizational Development and Quality of Work Life.

- Introduction -Organizational behavior and leadership.

This focuses on building the right team, team concepts, choosing your teams and specific concepts such as the Virtual Team. In addition, this presentation covers the 'all you need to know' ten steps of building powerful and influential teams.

- Powerful, Influence and Persuasion.

This focuses on the definitions, arts and ways to work with power, influence and persuasion. You can identify your own managerial style, or those of your manager. There is detailed information on power sources and tactics on how you can use them to your advantage. In addition, this presentation covers tips and ideas on how to deliver a knockout presentation, and ensure you get what you want. Finally there is specific and detailed information on the ethics of power, influence and persuasion – to help you manage your working environment.

- Managing Change.

This presentation focuses on the types and dimensions of changes and the different approaches taken to deal with changes in the workplace. It helps you identify if your organization is 'change ready' and what to do if it is not. There is a clear 7 step guide to effectively and efficiently dealing with change and implementation.

- Business Relationship Management.

This presentation focuses on the ITIL Service Management process of Business Relationship Management. This process is centered on the alignment of the business with the IT organization, and ensuring that activities take place to ensure a clear line of communication and understanding is present between IT and the customer.

Step 2

Below is an itemized list of the supporting documents and resources for easy reference. You can use these documents and resources within your own organization or as a template to help you in prepare your own bespoke documentation.

Organizational Behavior and Leadership

- Organizational Behavior Survey;
- Top Grading;
- Mapping Responsibilities;
- KPI's;
- Develop your leadership skills;
- Motivation;
- Values, Vision and Mission Statements;
- Rewards Systems;
- Virtual Teams - A New Model;
- Myths and Realities of Virtual Teams; and
- Trust Building and the Virtual Team.

Powerful, Influence and Persuasion

- The Power Profile;
- The S Curve;
- Rewards Systems;
- Avoiding Presentation Fright and Common Pitfalls; and
- Implementation Tools.

Managing Change

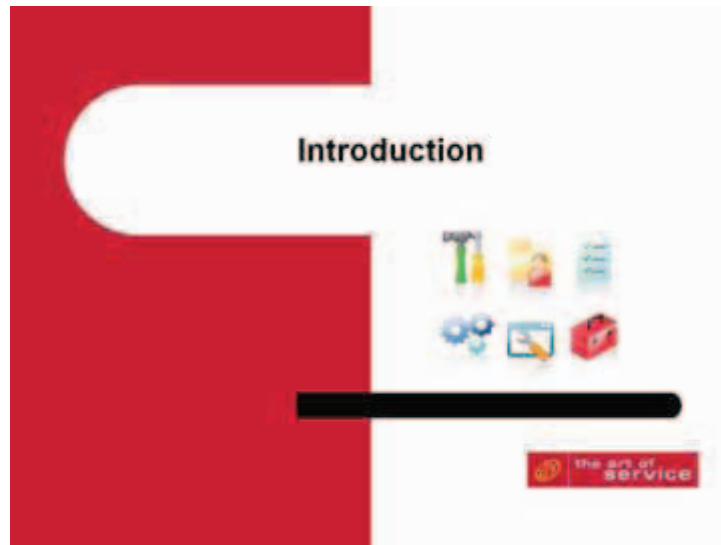
- Managing Change Effectively;
- Organizational Behavior Survey;
- Mapping Responsibilities;
- KPI's; and
- Rewards Systems.

Business Relationship Management

- BRM job description;
- BRM Responsibilities and Skills;
- BRM Metrics and Reports; and
- Mapping Responsibilities.



INTRODUCTION – ORGANIZATIONAL BEHAVIOR AND LEADERSHIP



Aim of this Guide

- Provide an introduction to the general principles of organizational behaviour and leadership:
- Provide user-friendly documents;
- Improve your knowledge and understanding; and
- Provide educational and awareness tools for staff within your organization.

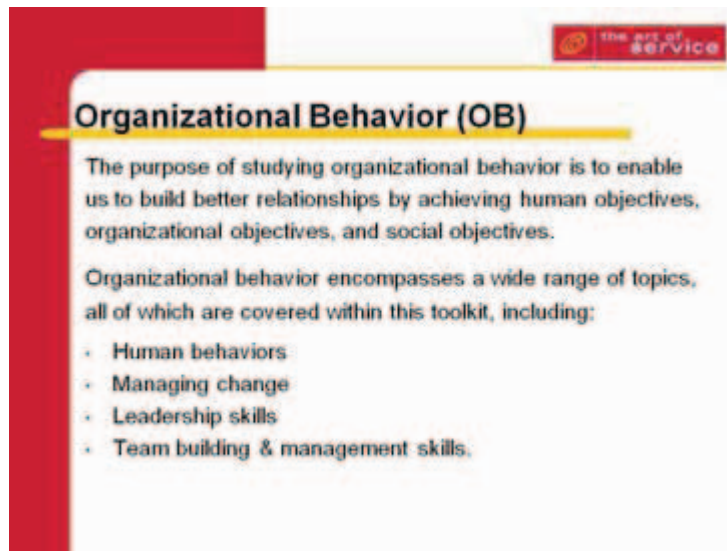


Organizational Behavior (OB)

Organizational Behavior (OB) is the study and application of knowledge about how people, both individuals and groups, act in organizations.

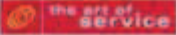
This is done by taking a systemic approach – interpreting people-organization relationships in terms of the:

- whole person;
- whole group;
- whole organization; and
- Whole social system.



The organization's base rests on management's philosophy, values, vision and goals. This in turn drives the organizational culture which is composed of formal organization, informal organization and the social environment.


The culture determines the types of leadership, communication, and group dynamics within the organization. Staff perceives this as the quality of work life, which directs their degree of motivation.

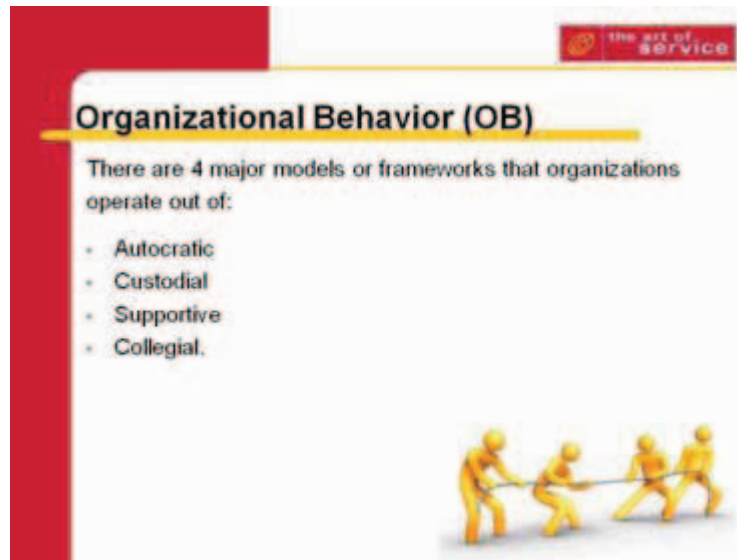


Organizational Behavior (OB)

The final outcomes are performance, individual satisfaction, and personal growth and development.

All of these elements combine to build the model or framework that the organization operates from.



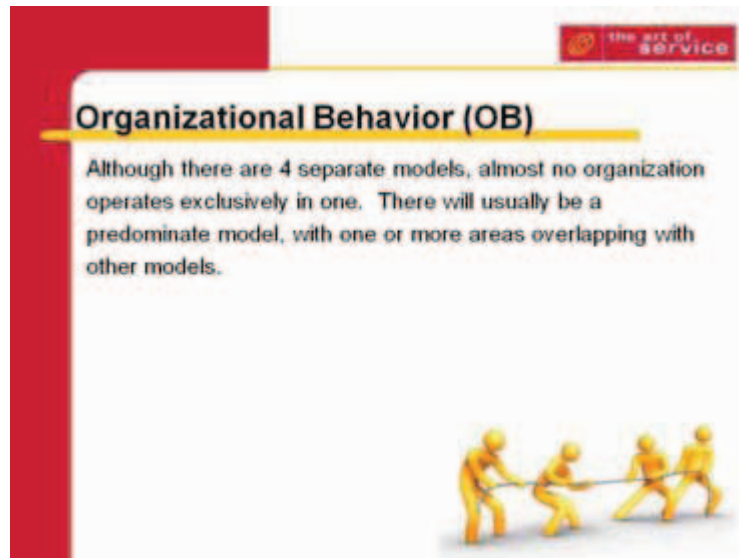


Autocratic – The basis of this model is power with a managerial orientation of authority. The employees in turn are oriented towards obedience and dependence on the boss. The employee need that is met by subsistence. The performance result is minimal.

Custodial – The basis of this model is economic resources with a managerial orientation to money. The employees in turn are oriented towards security and benefits and dependence on the organization. The employee need that is met with security. The performance result in passive cooperation.

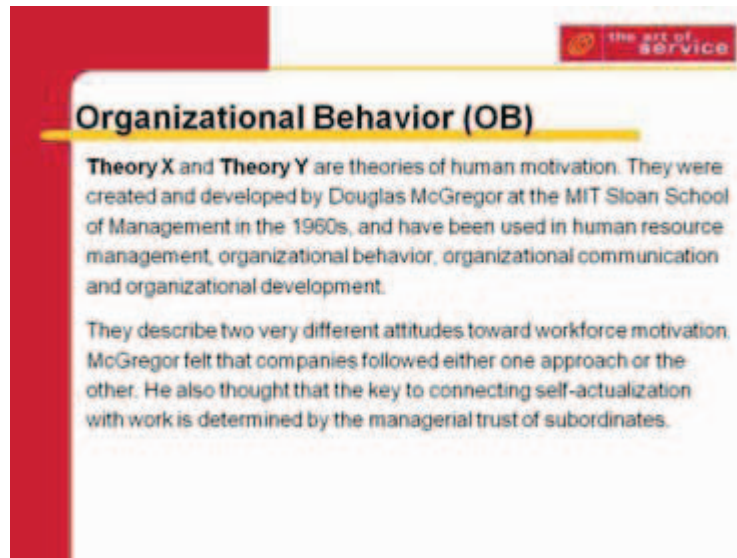
Supportive – The basis for this model is leadership with a managerial orientation of support. The employees in turn are oriented towards job performance and participation. The employee need that is met is status and recognition. The performance result is awakened drive.

Collegial – The basis for this model is partnership with a managerial orientation of teamwork. The employees in turn are oriented towards responsible behavior and self-discipline. The employee need that is met is self-actualization. The performance result is moderate enthusiasm.



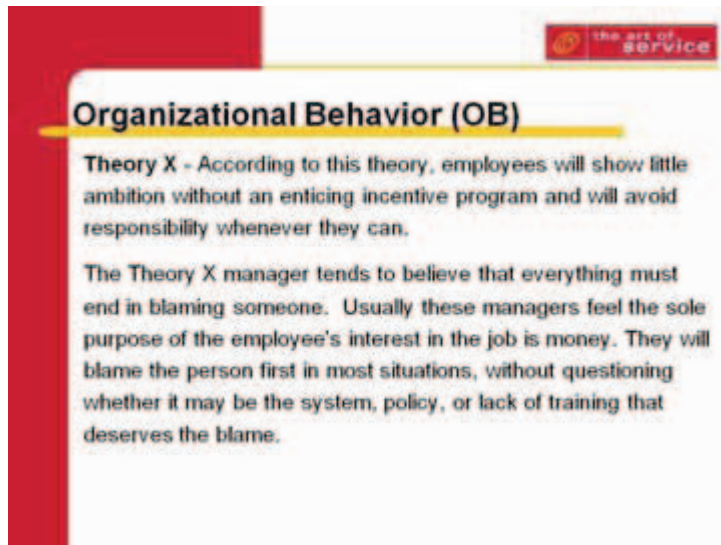
The first model, Autocratic, has its roots in the industrial revolution. The managers of this type of organization operate out of McGregors Theory X. The next three models begin to build on McGregors Theory Y.

They have each evolved over a period of time and there is no one 'best' model. The Collegial model should not be thought of as the last or best model, but as the beginning of a new model or paradigm.



Theory X - In this theory, which many managers practice, management assumes employees are inherently lazy and will avoid work if they can. Because of this, workers need to be closely supervised and comprehensive systems of controls developed.

A hierarchical structure is needed with narrow span of control at each and every level.



Organizational Behavior (OB)

Theory X - According to this theory, employees will show little ambition without an enticing incentive program and will avoid responsibility whenever they can.

The Theory X manager tends to believe that everything must end in blaming someone. Usually these managers feel the sole purpose of the employee's interest in the job is money. They will blame the person first in most situations, without questioning whether it may be the system, policy, or lack of training that deserves the blame.

Theory Y - In this theory, management assumes employees *may be* ambitious and self-motivated and exercise self-control.

It is believed that employees enjoy their mental and physical work duties. They possess the ability for creative problem solving, but their talents are underused in most organizations.

Given the proper conditions, theory Y managers believe that employees will learn to seek out and accept responsibility and to exercise self-control and self-direction in accomplishing objectives to which they are committed.

Theory Y - Managers believe that, given the right conditions, most people will want to do well at work. They believe that the satisfaction of doing a good job is a strong motivation. Many people interpret Theory Y as a positive set of beliefs about workers.

McGregor simply argues for managers to be open to a more positive view of workers and the possibilities that this creates.

Organizational Behavior (OB)

McGregor believes that Theory Y managers are more likely than Theory X managers to develop the climate of trust with employees that is required for human resource development.

This would include managers:

- communicating openly with subordinates
- minimizing the difference between superior-subordinate relationships.
- creating a comfortable environment in which subordinates can develop and use their abilities
- sharing decision making so that subordinates have a say in decisions that influence them.



Organizational Development (OD)

Organization Development (OD) is the systematic application of behavioral science knowledge at various levels, such as group, inter-group, organization etc. to bring about planned change.

The OD objective is a higher quality of work life, productivity, adaptability, and effectiveness. It accomplishes this by changing attitudes, behaviors, values, strategies, procedures, and structures, so organizations can adapt to competitive actions, technological advances, and the fast pace of *change* within the environment.



The seven characteristics of OD:

Humanistic Values: Positive beliefs about the potential of employees (McGregor's Theory Y).

Systems Orientation: All parts of the organization, to include structure, technology, and people, must work together.

Experiential Learning: The learners' experiences in the training environment should be the kind of human problems they encounter at work. The training should NOT be all theory and lecture.

Problem Solving: Problems are identified, data is gathered, corrective action is taken, progress is assessed, and adjustments in the problem solving process are made as needed. This process is known as Action Research.

Contingency Orientation: Actions are selected and adapted to fit the need.

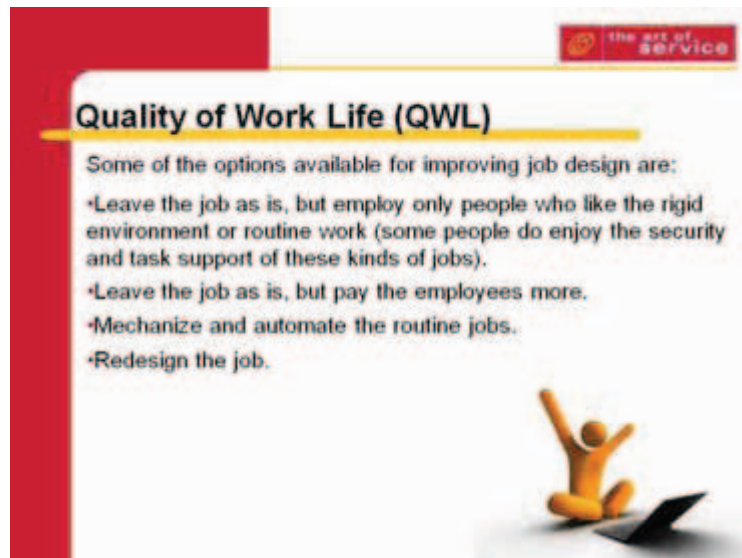
Change Agent: Stimulate, facilitate, and coordinate change.

Levels of Interventions: Problems can occur at one or more level in the organization so the strategy will require one or more interventions.



Quality of Work Life (QWL) is the favorableness or unfavorableness of the job environment. The purpose is to develop jobs and working conditions that are excellent for both the employees and the organization.

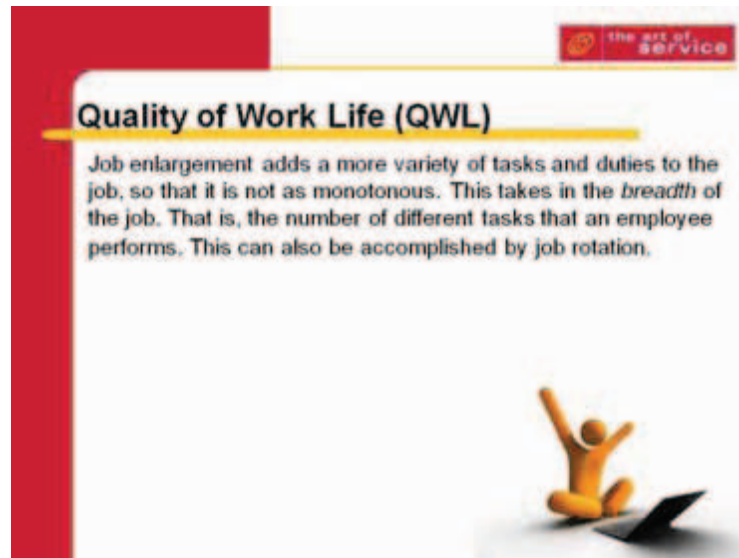
One of the ways of accomplishing QWL is through job design.



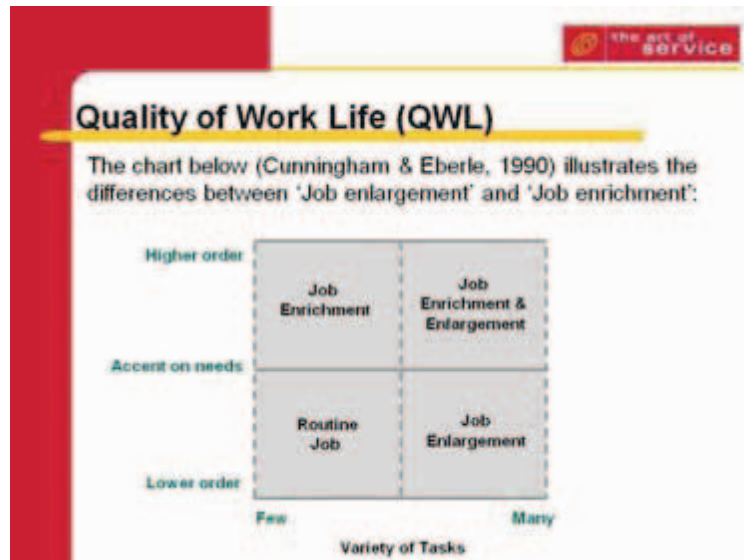
The slide features a red vertical bar on the left and a logo in the top right corner that reads 'the art of service'. The title 'Quality of Work Life (QWL)' is underlined in yellow. Below the title, the text reads: 'Some of the options available for improving job design are:'. A bulleted list follows: '•Leave the job as is, but employ only people who like the rigid environment or routine work (some people do enjoy the security and task support of these kinds of jobs).', '•Leave the job as is, but pay the employees more.', '•Mechanize and automate the routine jobs.', and '•Redesign the job.'. In the bottom right corner, there is a 3D illustration of a yellow stick figure sitting on the floor with arms raised in a celebratory gesture, next to an open laptop.

When redesigning jobs there are two spectrums to follow:

- Job enlargement; and
- Job enrichment.

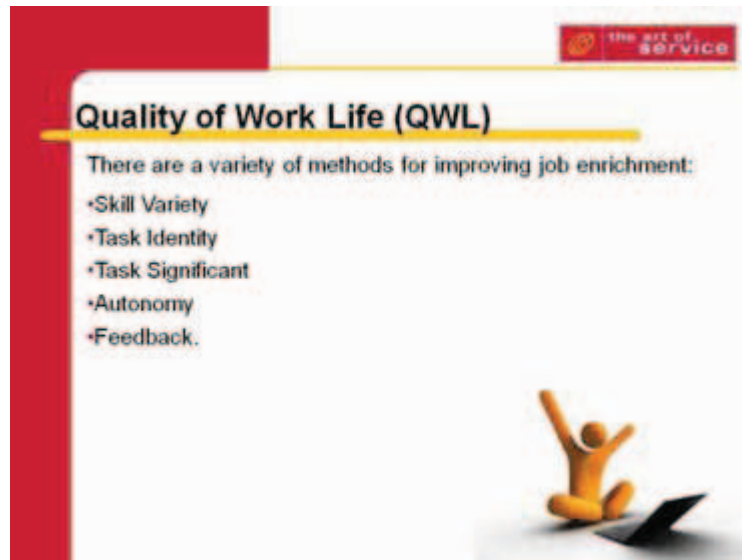


Job enrichment, on the other hand, adds additional motivators. It adds *depth* to the job - more control, responsibility, and discretion to how the job is performed. This gives higher order needs to the employee, as opposed to job enlargement which simply gives more variety.



The benefits of enriching jobs include:

- Growth of the **individual**;
- **Individuals** have better job satisfaction ;
- Self-actualization of the **individual**;
- Better employee performance for the **organization**;
- **Organization** gets intrinsically motivated employees;
- Less absenteeism, turnover, and grievances for the **organization**;
- Full use of human resources for **society**; and
- **Society** gains more effective organizations.



Skill Variety: Perform different tasks that require different skill. This differs from job enlargement which might require the employee to perform more tasks, but require the same set of skills.

Task Identity: Create or perform a complete piece of work. This gives a sense of completion and responsibility for the product.

Task Significant: This is the amount of impact that the work has on other people as the employee perceives.

Autonomy: This gives employees discretion and control over job-related decisions.

Feedback: Information that tells workers how well they are performing. It can come directly from the job (task feedback) or verbally from someone else.

Where now:

There are even more presentations within this toolkit that focus on:

- Organizational Behavior & Leadership
- Power, Influence and Persuasion
- Managing Change
- Business Relationship Management (IT & The Business)





ORGANIZATIONAL BEHAVIOR AND LEADERSHIP



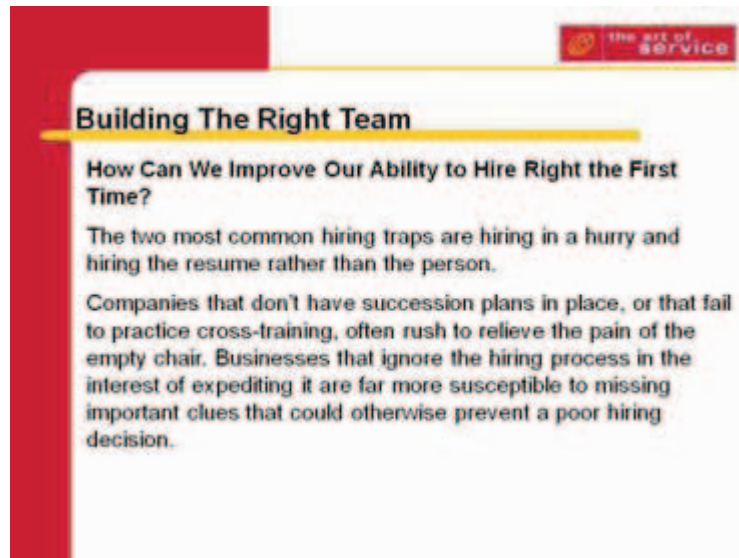
Company and marketplace:

The first step is to identify what skills and experience your organization needs to grow and succeed.

Only once you know this can you start to work out where your team is strong, where it is lacking.

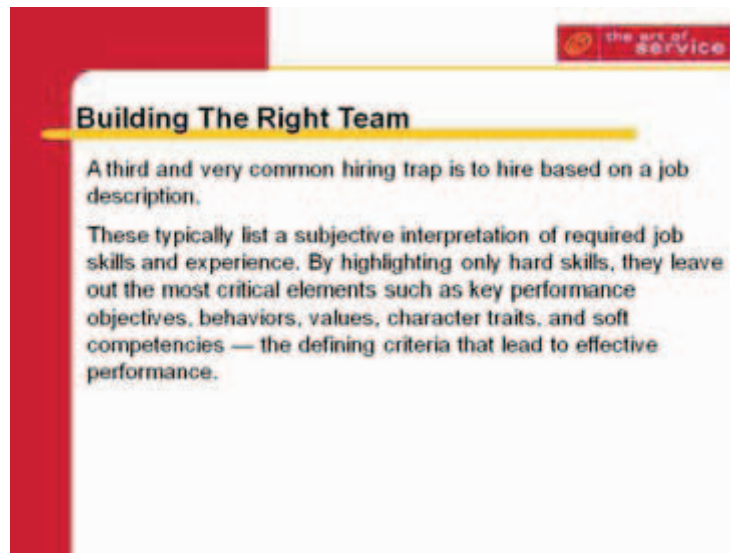
If you haven't already done so, define the exact nature of your team/product/service and its objective. Then ascertain the skills your team currently has in abundance and which skills they are missing.

See Organizational Behavior Survey on page 145 and Mapping Responsibilities found on page 149 within this guide.



See Topgrading found on page 159 within this guide.

Articles from *Harvard Business Review*, Spherion, and Kenexa report that more than 65per cent of all candidates do not prepare their own resumes and more than 45per cent of job applicants misrepresent the credentials on their resumes with one or more “tall tales.”



What is an Internal Hiring Process, and How Do We Create One?

If you hire someone you don't really know, for a position you have not thoroughly defined — chances are neither the person, nor the position will deliver. Hiring the right people right from the start requires implementation of a comprehensive internal hiring process that selects the best and eliminates the rest.



What "Right" Looks Like:

Before you evaluate your immediate needs, evaluate the company and team. This is called the 'Internal Human Capital Inventory and Assessment', and involves:

- Evaluating your core culture; and
- Evaluating your current team.

See Organizational Behavior Survey on page 145, Mapping Responsibilities on page 149 and Develop your leadership skills on page 175 within this guide.



Building The Right Team

- **Evaluating your core culture:**
 - Acknowledge your corporate values
 - Assess the character quotient of your company
 - Identify the non-negotiable character traits or core values for your company.
- **Evaluating your current team:**
 - Identify your key players and what innate abilities and traits make them successful
 - Identify what's working on the team and what isn't
 - Identify what elements are missing on the team that, if present, would make a positive difference.

See Motivation – found on page 205 within this guide



- Establish a hiring protocol and train everyone on the hiring to use and follow it;
- Create company-wide candidate-screening ground rules;
- Create a role-specific hiring benchmark for every role. Focus on the key performance indicators as they relate to the corporate strategy. Then isolate the core functions that the candidate would need to perform. Define the behaviors, values, habits, attitudes, and abilities of the ideal candidate. List the skills and experience required to limit ramp-up time;
- Validate and select the right assessment tools;
- Create behavioral-based interview models for each role in the company; and
- Establish a decision-making matrix (a weighted chart with a point value for each part of the puzzle, experience = 5; behaviors =10; skills =7, habits =15, values/motivators =15).

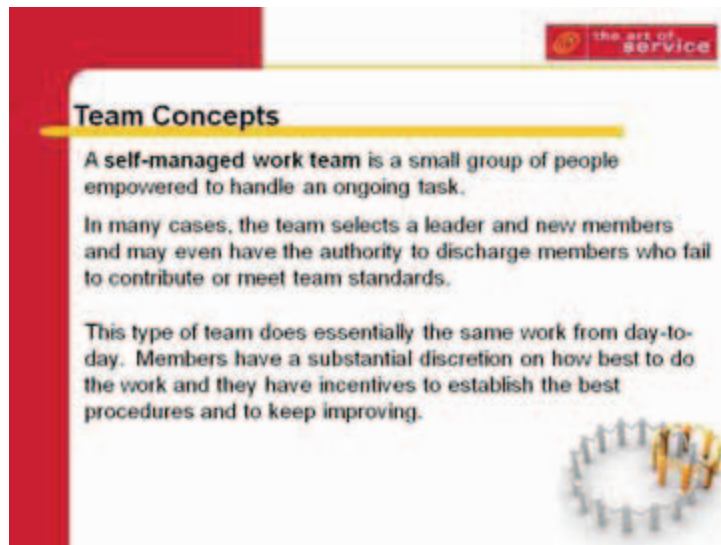


Organizations form different types of teams for different purposes. For example:

- Senior management teams develop philosophy, policy and direction;
- Task forces implement specific plans for addressing problems or opportunities;
- Quality circles work on specific quality, productivity and service problems;
- Self-managed work teams meet on a daily basis to perform an entire work process; and
- Virtual teams bring geographically separate individuals together around specific tasks.

Project Teams, unlike self-managed teams, are organized around a non-routine task of limited duration. The task may take one week, or one year, but when the job is done, the team will disband.

Big, long-term projects with many members often have both a team leader and a full-time project manager.




Team Concepts

A **self-managed work team** is a small group of people empowered to handle an ongoing task.

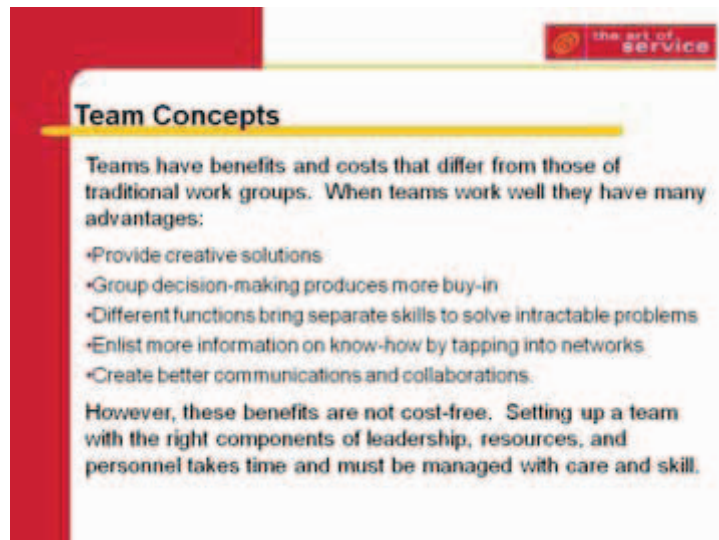
In many cases, the team selects a leader and new members and may even have the authority to discharge members who fail to contribute or meet team standards.

This type of team does essentially the same work from day-to-day. Members have a substantial discretion on how best to do the work and they have incentives to establish the best procedures and to keep improving.



Teams are unnecessary when tasks are simple and routine, do not require employees to coordinate their work, and do not require a variety of experiences or skills. Teams are best approached when:

- No individual has the right combination of knowledge, expertise, and perspective to do the job;
- Individuals must work together with a high degree of interdependence; and
- Goals represent a unique challenge.



An essential factor of team success is starting out with a clear, common goal – with performance metrics.

Managers should be able to take each member of the team to one side and expect them to clearly state the team’s goal, objective, scope and value.

Team members must share an understanding of the goal, and be able to demonstrate goals in terms of performance metrics, or Key Performance Indicators (KPIs).


See KPIs, found on page 223 within this guide.



Team Concepts

No team operates in a vacuum. A team is a small organization embedded within a larger environment of operating units and functional departments. It depends on its 'organizational family' to one degree or another for resources, information and assistance.

The extent to which operating units and departments are supportive, indifferent, or hostile to the team and its goals is bound to impact team effectiveness.



See Values, Vision and Mission Statements, found on page 231 within this guide.



Leadership and support – Support at the top is essential. It ensures resources and helps recruit the right people. Leadership support also provides protection from powerful managers and departments that for one reason or another would be inclined to torpedo the team effort.

A nonhierarchical structure – Team-based work is more likely to be successful if the organization does not conform to a rigid hierarchical structure. A non-hierarchical structure created habits that are conducive to team-based work: specifically, a willingness to share information, collaboration across organizational boundaries, and employee empowerment. These habits are weak or absent in organizations where the bosses do all the thinking and directing and everyone else follows orders. Such organizations are not team-ready.

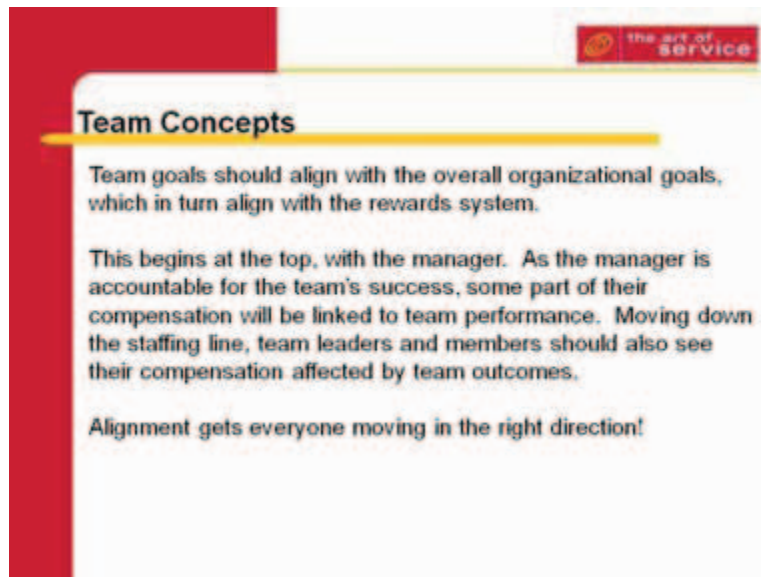
Appropriate reward systems – Companies that are new to team-based work need to examine their reward systems before launching teams; they must find a different balance in rewards for individual and team-based success. Doing so is one of the most daunting challenges faced by those sponsor teams.

See Rewards Systems, found on page 237 within this guide.



Continued...

Experience with team-based work – Teams benefit when their companies and individual members have plenty of experience with team-based work. Experience provides insights into what works and what does not, how best to organize around a goal, how to collaborate, and how to alter the team at different points of its lifecycle. Teams will need to be trained in skills conducive to the team-work arena, such as, listening, communicating, collaborating and staying focused on the common task.



Team goals should align with the overall organizational goals, which in turn align with the rewards system.

This begins at the top, with the manager. As the manager is accountable for the team's success, some part of their compensation will be linked to team performance. Moving down the staffing line, team leaders and members should also see their compensation affected by team outcomes.

Alignment gets everyone moving in the right direction!

See Rewards Systems, found on page 237 within this guide.

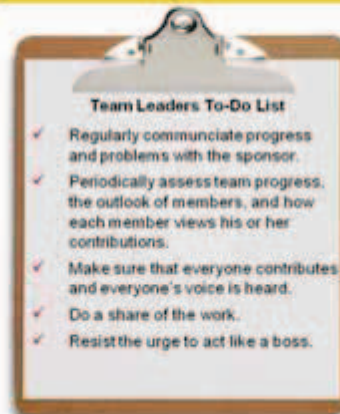


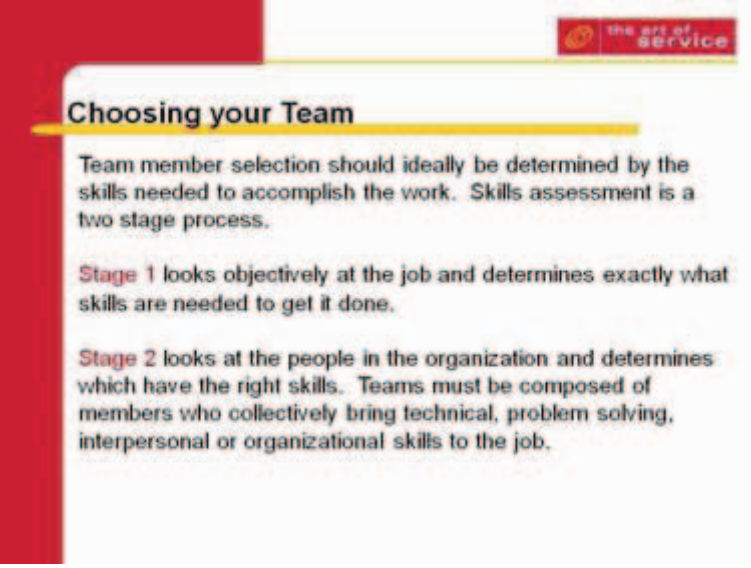
By virtue of their appointment, the team leader enjoys formal authority. But a team also needs leadership within the ranks and at different levels.

E.g. several team members may be assigned to develop and test a new product prototype. Leadership is required within this 'team within a team' to coordinate the effort, communicate with others, and secure necessary resources.

Whoever acts as the leader of this ad hoc group will have no formal authority, but will be required to do what leaders do.

Choosing your Team





Choosing your Team

Team member selection should ideally be determined by the skills needed to accomplish the work. Skills assessment is a two stage process.

Stage 1 looks objectively at the job and determines exactly what skills are needed to get it done.

Stage 2 looks at the people in the organization and determines which have the right skills. Teams must be composed of members who collectively bring technical, problem solving, interpersonal or organizational skills to the job.

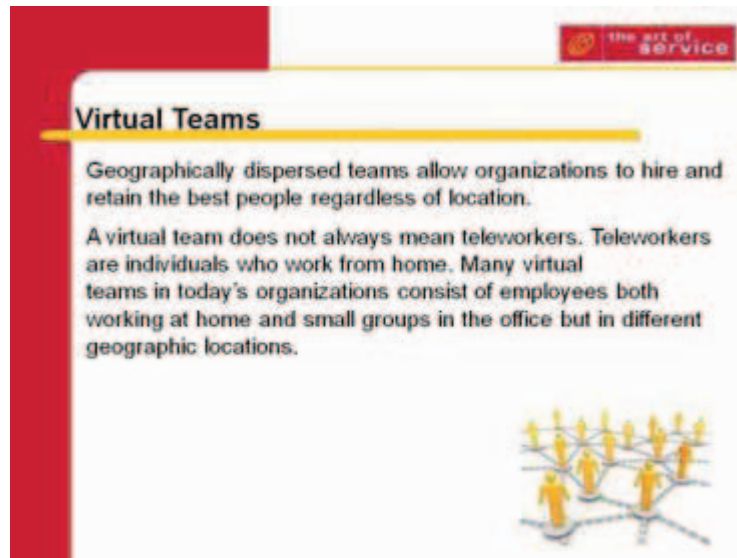
See Topgrading found on page 159 within this guide



A **Virtual Team** – also known as a **Geographically Dispersed Team** (GDT) – is a group of individuals who work across time, space, and organizational boundaries with links strengthened by webs of communication technology.

They have complementary skills and are committed to a common purpose, have interdependent performance goals, and share an approach to work for which they hold themselves mutually accountable.

See Virtual Teams on page 243, Myths and Realities of Virtual Teams on page 245 and Trust Building and the Virtual Team found on page 247 within this guide.



Why Virtual Teams?

- The 'best' employees may be located anywhere in the world.
- Workers demand personal flexibility/increasing technological sophistication.
- A flexible organization is more competitive and responsive to the marketplace.
- Workers tend to be more productive – less commuting and travel time.
- The increasing globalization of trade and corporate activity.
- The global workday is 24 vs. 8 hours.
- The emergence of environments which require inter-organizational cooperation as well as competition.
- Changes in workers' expectations of organizational participation. A continued shift from production to service/knowledge work environments.
- Increasing horizontal organization structures characterized by structurally and geographically distributed human resources.



Networked Teams - consist of individuals who collaborate to achieve a common goal or purpose; membership is frequently diffuse and fluid.

Parallel Teams - work in short term to develop recommendations for an improvement in a process or system; has a distinct membership.

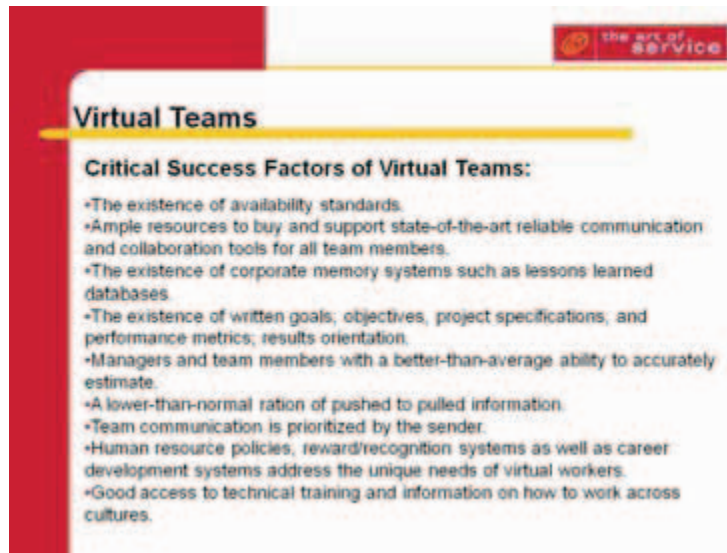
Project or Product-Development Teams - conduct projects for users or customers for a defined period of time. Tasks are usually non-routine, and the results are specific and measurable; team has decision making authority.

Work or Production Teams - **perform** regular and ongoing work usually in one function; clearly defined membership.

Service Teams - support customers or the internal organization in typically a service/technical support role around the clock.

Management Teams - **work** collaboratively on a daily basis within a functional division of a corporation.

Action Teams - offer immediate responses activated in (typically) emergency situations.



In addition:

- Training methods accommodate continual and just-in-time learning;
- There are standard and agreed on technical and “soft” team processes;
- A “high trust” culture; teamwork and collaboration are the norm;
- Leaders set high performance expectations; model behaviors such as;
- Working across boundaries and using technology effectively;
- Team leaders and members exhibit competence in working in virtual; and
- Environments.

Virtual Teams

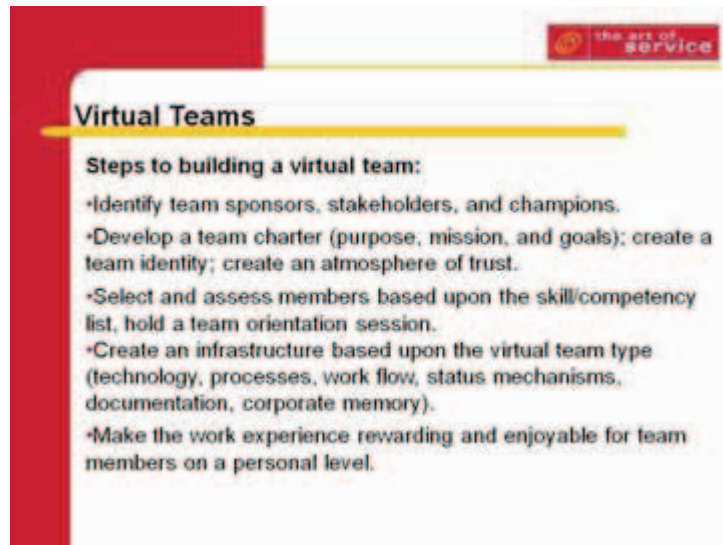
Virtual Team Sociology

Within the virtual connection is an opportunity for efficiency and team synergy unrealized in traditional teams and worker interaction. The realization of these possible outcomes is reliant upon the development of new team sociology, inclusive of all virtual team members with their varying geographies and cultures; including contingent workers from outside the immediate organization.





- Team members have to adopt and adapt to new technologies;
- Members must be more adaptive – “resilient” to a changing variety of assignments and tasks during the life of any particular team;
- Team membership more dynamic with changing tasks and responsibilities;
- Roles will be more dynamic because virtual teams are more flexible regarding organizational responses to market needs;
- Members are required to have superior team participation skills; team membership is fluid requiring team members who can quickly assimilate into the team (the responsibility for assimilation is primarily with the new member);
- Virtual teams will be expected to be able to repeatedly change membership without losing productivity; little time will be available for team members to learn how to work together;
- Technology such as intranets can streamline socialization of new members by coming up to speed quickly with archived written information, video, and audio recordings; and
- Employees will have to learn to join teams and accept new members without the benefit of time-related socialization. Norms and role expectations must be expressed explicitly to new members who must quickly acculturate.



Virtual Teams

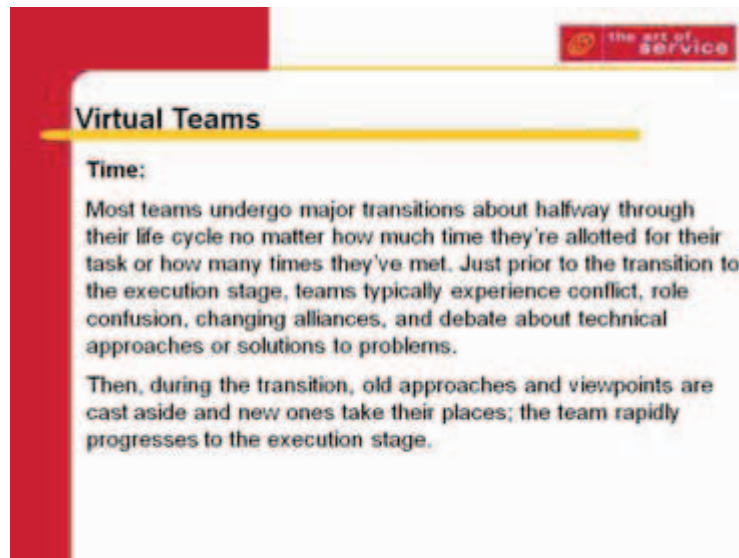
Steps to building a virtual team:

- Identify team sponsors, stakeholders, and champions.
- Develop a team charter (purpose, mission, and goals); create a team identity; create an atmosphere of trust.
- Select and assess members based upon the skill/competency list, hold a team orientation session.
- Create an infrastructure based upon the virtual team type (technology, processes, work flow, status mechanisms, documentation, corporate memory).
- Make the work experience rewarding and enjoyable for team members on a personal level.

Three factors that affect virtual team dynamics:


- Time;
- Environmental Influences; and
- Team Composition.

See Values, Vision and Mission Statements, found on page 231 within this guide.



Environmental Influences:

- How embedded or rooted the team is in the organization as demonstrated by the team's activities being supported by the organization's structure, processes, communication channels, management, and reward structure;
- The more complex the team's task, the greater the chance of conflict and disagreement about roles, approaches to problems, and definition of outcomes. Repeatable and simple tasks equate to less time spent in activities such as conflict resolution, role definition, and authority relationships in the group; and
- Electronic communication and collaboration technology can affect both task and social dynamics positively and negatively.



Virtual Teams

Team composition:

- Cultural differences: cultural dimensions that appear to have the greatest potential to affect virtual team dynamics are *individualism-collectivism* (independent vs. participatory orientation), *power distance* (team members from different levels in the organization), and *uncertainty avoidance* (high vs. low structure/definition).
- Differences in functional background: cross-functional teams experience more disagreement regarding team process, priority, etc.
- Team size.



See Organizational Behavior Survey, found on page 145 within this guide.



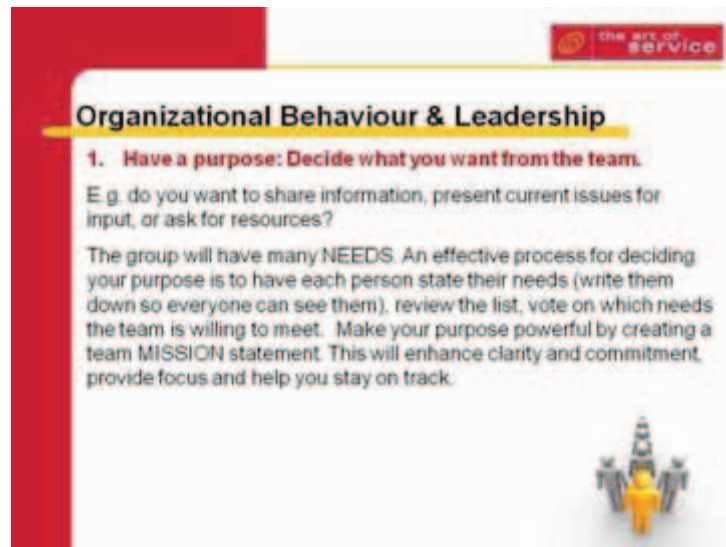
The infographic features a red vertical bar on the left and a red header with the text 'the art of service' in a white box. The main title is 'Organizational Behaviour & Leadership'. Below the title is a paragraph: 'Whether you are building an independent team or a team within a large organization, there are 10 steps that will help you and your team members achieve powerful results.' A numbered list of 10 steps follows. At the bottom right, there is a small 3D illustration of a person in a yellow suit standing on a yellow base.

Organizational Behaviour & Leadership

Whether you are building an independent team or a team within a large organization, there are 10 steps that will help you and your team members achieve powerful results.

1. Have a purpose
2. Establish trust
3. Set ground rules
4. Manage new entries
5. Regular schedule
6. Set a duration and stick to it
7. Strong open and close
8. Establish meeting processes
9. Manage contributions
10. Work continues, between meetings.

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For inspiration, take a look at some famous mission statements used at various times by well-known companies.

1. Reebok: "Our purpose is to ignite a passion for winning, to do the extraordinary, and to capture the customer's heart and mind."
2. Walt Disney: "To make people happy."
3. Wal-Mart: "To give ordinary folk the chance to buy the same things as rich people."
4. The Body Shop: "Tirelessly work to narrow the gap between principle and practice whilst making fun, passion and care part of our daily lives."
5. Marks and Spencer: "Our mission is to make aspirational quality accessible to all."
6. Sony: "Our mission is to experience the joy of advancing and applying technology for the benefit of the public."
7. Coca Cola: "The basic proposition of our business is simple, solid and timeless. When we bring refreshment, value, joy and fun to our stakeholders, then we successfully nurture and protect our brands."
8. 3M: "To solve unsolved problems innovatively."
9. Glaxo: "We are an integrated, research-based group of companies whose corporate purpose is to create, discover, develop, manufacture, and market safe effective medicines throughout the world."



A statement of mission is one of the most powerful things you can do, whether you are running a major corporation or a small team. It expresses the purpose for the organization's existence, its raison d'être, and becomes the rallying point around which everyone can unite.

Often managers create mission statements because they think they should and then leave them gathering dust on the shelf. But this is to mistake the real power and purpose of mission statements. If put together with real understanding of what a group of people can achieve, they can act like irresistible magnets drawing everyone in the same direction.

It is one of the core roles of leaders, whether at the top of the organization, or anywhere within it, to confirm, verify, communicate, and live the mission statement. Here are some of the ways that can happen.

See Values, Vision and Mission Statements, found on page 231 within this guide



- Write your Mission Statement down. Although it can be used for promotion purposes, it should never be seen purely as a promotional tool but as the group expressing the best version of it;
- Think first about how the group benefits others. These could be those who work for it, those who are its customers, the wider community, or future generations;
- Think in terms of being sent on a mission by a higher power. If you see the organization as fulfilling a role at some profound level, beyond perhaps your immediate understanding, then the Mission Statement becomes easier to write;
- Your mission will have far more power if you get a sense of the business's unique and special purpose, rather than simply re-stating its aim to make money for its stakeholders.;
- Tie in your Mission Statement with your goals, aims, and visions. Use language that everyone can understand. The best Mission Statements are simple monosyllabic one-liners.; and
- Don't worry about getting it right first time. Just like our own understanding of our purpose on this earth, understanding the mission of your organization is a work in progress. So keep at it and revise it as you go.



2. Establish trust: CONFIDENTIALITY is essential.

Trust and team are almost synonymous. However, as a manager, you cannot assume that trust develops naturally as part of the team's personality.

Bringing trust—what it means, how it works, and why it matters—to the front of every team member's mind can be a great step towards team success. A great step that demands your attention.



Increased Efficiency -- As team members trust that everyone will carry out her responsibility, all can attend their specific functions more completely. The decrease in distractions gives an increase to efficiency.

Enhanced Unity -- The greater each member of a team trusts other members, the greater strength the team assumes. This unity strengthens the team's commitment to fulfill its purpose.

Mutual Motivation -- When two (or more) people trust one another, each one consciously and subconsciously strives to uphold the others' trust. That motivation stimulates each team member to seek peak performance.



Open Expression -- Every team member needs ongoing opportunities to express their thoughts regarding the team's purpose, process and procedures, performance, and personality. From the team's get-go, the team leader can initiate every individual's chance to speak to the team's actions. A truly effective leader ensures that even the quietest member is heard (and so becomes increasingly comfortable speaking up). The more everyone on a team has chances to express openly, the more everyone grows used to speaking freely and to being heard. *Open expression quickly becomes everyone's pleasure, and not just the leader's responsibility.*

Information Equity -- When it comes to information relevant to the team and the team's function, the rule must be "all for one and one for all." Information available to one team member must be available to all members. The secret of this trait is in the process. Standardized practices for sharing information equally are simple. A few minutes setting up a *team email address* and holding a *five-minute update* each morning are two examples. These can establish everyone-gets-to-know-what-everyone-gets-to-know behavior patterns. *Trust level rises when no one fears that she receives less information than others.*



Continued...

Performance Reliability -- We trust people we can count on. We count on people who do what they say they will do when they say they will do it. Conscientious work on the first two traits produces results in the third. Open expression and shared information enhance team members' performance reliability. Open communication can place everyone's performance cards on the table: strengths and weaknesses, confidence and fears. Equal information allows everyone to know what and how every other team member contributes to success. This knowledge produces shared support, praise, and assistance. What is more team-like than that? *When expectations of every team member are up front and open, every team member strives to perform at full force for the good of the team.*



1. Talk the Talk. Take responsibility for role modeling Open Expression. Don't be afraid to share information about yourself. Encourage others to do the same. Keep at it.

2. Build the Pattern. At team meetings and water-cooler chats, establish the tell-and-ask pattern. Share information about your work and ask questions about your teammate's work. It takes a bit of repetition to anchor the pattern. It's worth it.

3. Distribute to Discuss. Make it team belief that one reason for distributing information to everyone is so that it can be discussed. "New data" can be a constant agenda item at meetings. "What do you think?" can be a constant question among team members.

4. Make Good News. Usually people want to complete work rather than fulfill roles. Not much to say about one's role. Much to share about one's work. Create opportunities for people to comfortably share good news about the work they perform. (Bulletin boards, email news, lunch discussions, for example).



Continued...

5. Use a Constructive Question. Have your team adopt a specific question that does two things: directs attention to the team's purpose and stimulates communication. The question can be an icebreaker at team meetings, a common follow-up to "Hi! How are you?" in the halls, a regular element in team reports. Example questions: What progress have we made? What have we done that makes us proud? What obstacles have we overcome?



3. Set ground rules:

Ground rules are statements of values and guidelines which a group establishes consciously to help individual members to decide how to act.

Team ground rules define a behavioral model which addresses how individuals treat each other, communicate, participate, cooperate, support each other, and coordinate joint activity. They may be used to define and standardize team procedure, use of time, work assignments, meeting logistics, preparation, minutes, discussion, creativity, reporting, respect and courtesy.



3. Set ground rules: Examples:

- Start and end the meeting on time;
- Have a prepared agenda with an objective and expected outcomes ;
- 'Parking lot' discussion items that don't relate to the objective ;
- Complete action items as committed;
- One person speaks at a time ;
- All team members are equals ;
- Leave rank at the door ;
- Address conflict by dealing with the issue not the person ;
- Turn of cell phones / pagers ;
- Notify the team in advance if you will be absent;
- Listen actively ;
- Be a participant, not a lurker ;
- What's said in the room, stays in the room;
- Have fun, but not at the expense of someone else's feelings; and
- Be present, both physically and mentally.



4. Manage new entries:

Teams can ensure a smooth transition by providing a thorough orientation for new members. Once they gain knowledge about processes, procedures, and available tools, new team members can quickly begin applying their talents and skills to the team's purpose.

While taking steps to orient new team members seems like common sense, orientation often gets pushed to the back burner, overshadowed by what may seem to be higher priorities. However, because there are always new members, it is never too late to plan for your next new team member orientation!



- **Partnering with a 'buddy'.** Current team members who will work side-by-side with a new member can do a great job with orientation because they have the knowledge to function in the same environment as the new member. A buddy system also reinforces a culture of interdependence among team members;
- **Understanding the culture.** Teams often develop their own culture, which is a combination of the over-arching organizational culture and a more localized aspect based on the people and the purpose of the team. Culture includes: the core values acknowledged by the team; how members conduct themselves in work-related and personal matters; and the language, vocabulary and communication styles used in the team's environment; and
- **Navigating the organization.** This is critical if the new team member is coming from outside the organization, but it is also good to review with members who may be transferring internally. You want to ensure they are comfortable with the names, faces, titles, roles, and reporting relationships that affect the team.



- **Utilizing the procedures.** To get things accomplished in any organization, teams deal with a number of procedures that have been adopted and adapted over time. New team members were likely pros at utilizing procedures on their last team, but they may become stalled at every turn without structured guidance. Procedures are designed to facilitate work, not hamper it. Don't let them become traps for new team members;
- **Accessing the tools.** A new team member may be a whiz at the team's primary software programs, but they have to know how to access the shared drive to be able to collaborate. Tools can include technology, supplies, administrative support, and other resources.; and
- **Committing to the mission.** The basis of any business team is that the members share a common purpose – to achieve the team's mission. New team members can be at a disadvantage if they join a team that has a well defined purpose, yet their commitment is necessary to their success and that of the team. In addition to ensuring that they understand the mission, the team may need to reengage in discussion of its purpose so that new members can be heard and become fully committed.



Organizational Behaviour & Leadership

5. Regular schedule:

Regularly scheduled meetings are easier to remember and quickly become part of your ROUTINE.

Decide how often you want to meet (biweekly, monthly, etc.) and decide on dates and times, such as, the first and third Monday's of the month at 5:00 p.m.

Hold your meetings in a central location or rotate locations. Although a team member may initially agree to drive a longer distance, this can become an irritant over time.



Organizational Behaviour & Leadership

6. Set a duration and stick to it:

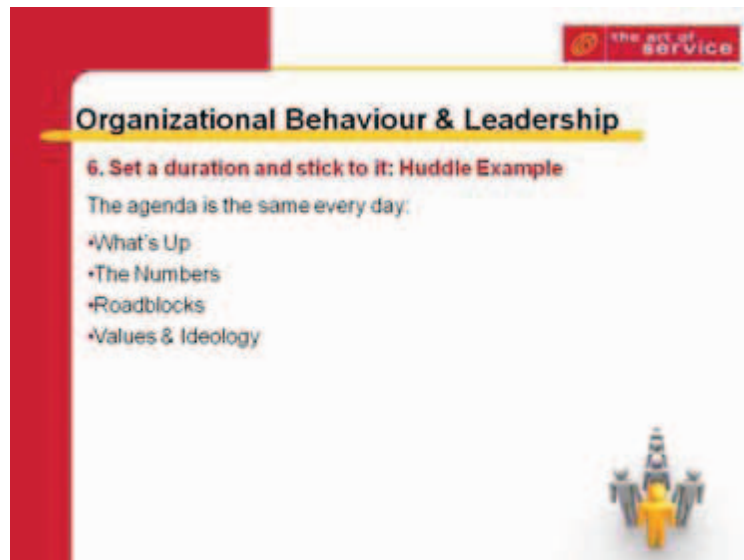
Once people begin looking at their watches and wondering if the meeting will ever end, the meeting loses effectiveness. Always adhere to the allotted time.

Consistently running late will undermine the group. Start a "Parking Lot" where you can PARK the conversations and items you were unable to cover in the allotted meeting time. Ask for a volunteer "Parking Lot Attendant" to put these items in writing and bring them to the next meeting.





- Time of Day — it should be as early as possible (ideally in the morning);
- Length of Time — 5 to 15 minutes (depending on the size of the team);
- Number of Attendees — Teams of 7 or fewer people (if you have teams that are larger than 7, you probably have a team that needs to be split up);
- Who attends — every person in your company should be attending at least one Daily Huddle (but no person should attend more than two or three);
- Who Runs it — Pick the senior manager of the particular team to run it (unless he or she is not organized in which case pick the most senior organized person); and
- Where Does it Take Place — It can be done in person or over the phone or on videoconferencing if facilities are available.



What's Up — the first section of the Daily Huddle should be about each of your team members sharing the What's Up of what they've accomplished since you all last met. Total Time: 3 to 5 minutes (every participant should talk for no more than 30 seconds each).

The Numbers — the second section is about the numbers of your business. Here, you should cover the critical metrics that are most important to your team. For example, in my Sales Daily Huddle, we report on such vitals as total sales by brand from the previous day (with comparisons to prior periods) and percentage of our monthly sales goal we project. Total Time: 3 to 5 minutes.

Roadblocks — this section focuses on the roadblocks (also called “bottlenecks”) that the team members face. Total Time: 3 to 5 minutes.

Values and Ideology — this last section covers values-related items that don't fit nicely into the first 3 sections of the meeting. An example of Values or Ideology items might be praise that someone outside the group has earned or a personal item that someone outside the meeting is facing that is affecting their performance.




Organizational Behaviour & Leadership

7. Set 'Open' & 'Close':

Having a strong open and close to your meetings will help ensure that they start and end on time and will help team members stay FOCUSED and committed.

For instance, you can start by reading your mission statement or close by reading an inspirational quote or passage that will help keep the group motivated. This responsibility can be rotated among team members.






Organizational Behaviour & Leadership

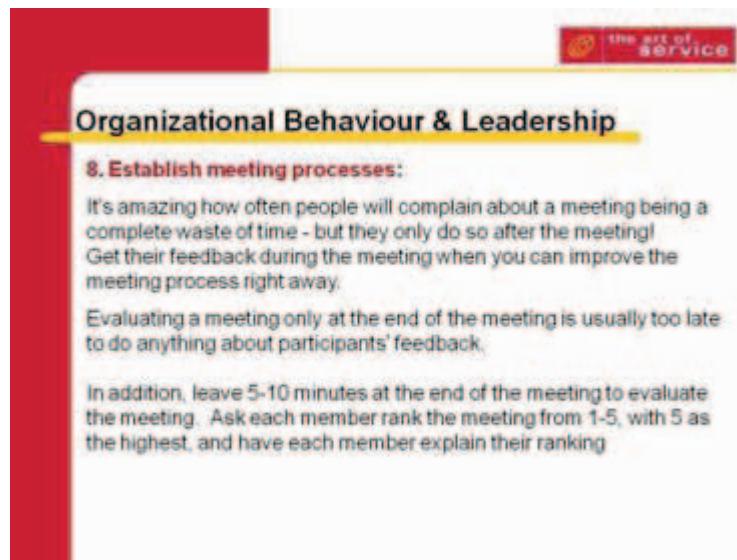
8. Establish meeting processes:

As a group, decide how you want your meetings to FLOW.

- Do you want a formal agenda with submitted items that can vary from meeting to meeting?
- Do you want a consistent format that does not vary?
- Do you want to use some meetings to discuss general issues, such as marketing or networking, or to address issues that are specific to each team member?



Whatever you want your format to be, agree to it and stick to it. Empower each member to raise the red flag if the team is getting off-track, going overtime, etc. Agree to a signal such as a raised hand, a real red flag, or a sign.



Organizational Behaviour & Leadership

8. Establish meeting processes:

It's amazing how often people will complain about a meeting being a complete waste of time - but they only do so after the meeting!
Get their feedback during the meeting when you can improve the meeting process right away.

Evaluating a meeting only at the end of the meeting is usually too late to do anything about participants' feedback.

In addition, leave 5-10 minutes at the end of the meeting to evaluate the meeting. Ask each member rank the meeting from 1-5, with 5 as the highest, and have each member explain their ranking

Organizational Behaviour & Leadership

9. Managing contributions:

Monopolizing conversations can cause high group frustration. To prevent this, divide your meeting time so that each team member has a specified amount of time to present his or her needs and get team feedback. Also, ask that team members give their input, feedback, etc. in the fewest words possible. Ask for a volunteer time keeper to alert members when they have five minutes of time remaining.





Monopolizer - The Monopolizer believes everyone else is there to hear him or her speak. Sadly other people shy away from contributing, intimidated by the Monopolizer's strangle hold on the meeting.

When facilitators allow an employee to monopolize a business meeting, it sends the message that their rudeness is sanctioned. The facilitator, or even other meeting participants, should indicate an interest in hearing from others in the meeting, to remind the Monopolizer that others can speak as well as listen.

Tangent Talker - hijacks the topic of the group by taking discussions off on tangents - topics unrelated to the issue at hand. The meeting leader's ability to recognize the tangent and refocus is essential to a productive meeting. "Let's remember to confine ourselves to the topic at hand" is a good way to get back on track. Alternately saying, "Let's try to avoid tangents" also labels such behavior as contrary to the group's aims. As well, you can "park" extraneous items in the "parking lot" list where they're noted, if only to be addressed later.



Devil's Advocate - This person seems to relish taking the opposite tack. Whatever the argument being put forth, this person delights in taking an opposing view. Often this employee begins by saying "just for the sake of argument - I believe the opposite is true." While there is value in looking at issues from multiple points of view and to avoid group think, the Devil's Advocate applies their technique to every issue, every argument and every conversation. A good business meeting leader can praise this person's ability to raise alternative issues. At the same time, the business meeting leader must indicate its inappropriateness, given time parameters or previously agreed upon issues.

Cynic - Adroit at using the phrase, "it won't work," they are skilled at deflating and defeating whatever motion is in motion. "Can't be done." "They'll never buy it." Challenge cynical employees to think like the Devil's Advocate; suppose for a minute that the idea or project could work. Use a common conflict resolution tool and ask the Cynic to embrace the other side's point of view as if it were their own, and argue that side's position.

Fence Sitter - are unable to make decisions. Despite being in a deliberative body, they are conflicted by multiple arguments, and can't "pull the trigger" when it's time to make a decision in a business meeting. Try to cajole the Fence Sitter into action. Remind them that they have a vote and were invited to use it. Ask them their opinions on matters to draw them out and get them on record.



Organizational Behaviour & Leadership

10. Work continues, between meetings:

ACTION is the most powerful way to get results. When you share a commitment with your team, your chances of meeting it increase exponentially.

Make commitments to action a regular part of your meeting process. Open your meeting with WINS and WOWS. Have a quick round-robin where each team member has an opportunity to share something great that has happened for them since your last meeting.

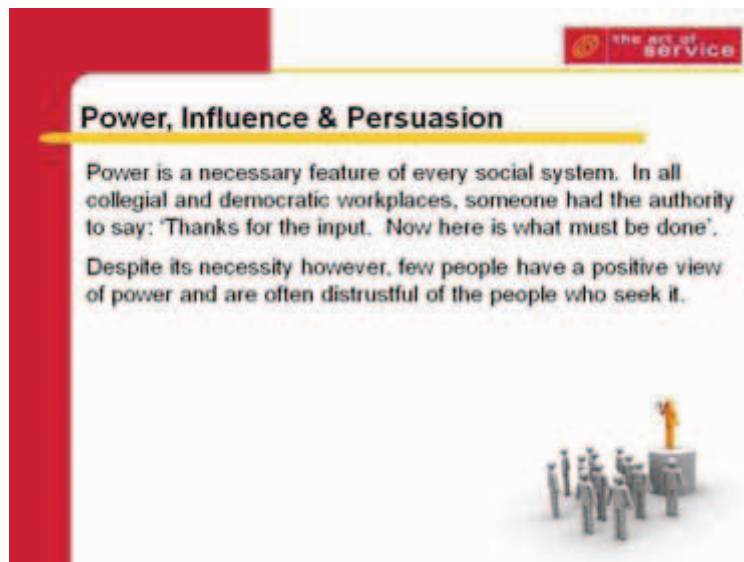


POWERFUL, INFLUENCE AND PERSUASION



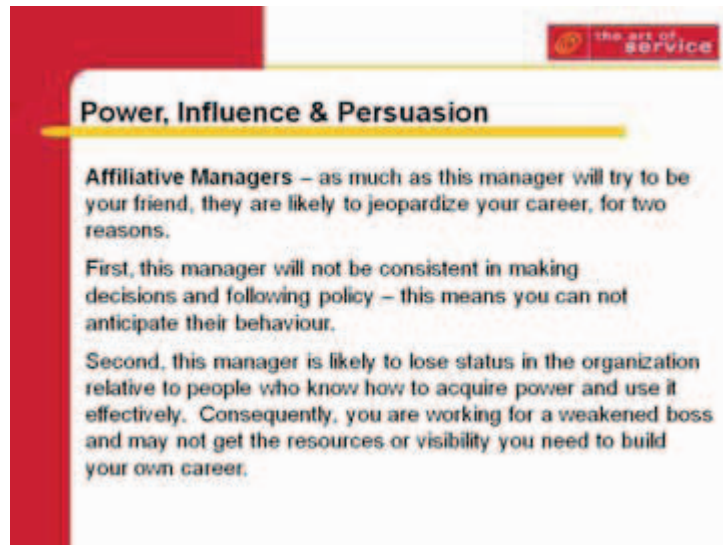
Every business and virtually every human society operates with the help of power, influence and persuasion. They are essential to organizational and interpersonal functions as the air we breathe.

Every one of us is routinely on the giving and receiving end of power, influence and persuasion – often simultaneously. Even as we are subject to the power of our bosses, we are influencing and persuading them.



There are three types of 'Power Manager':

- Affiliative Managers;
- Personal Power Managers; and
- Institutional Managers;



Power, Influence & Persuasion

Affiliative Managers – as much as this manager will try to be your friend, they are likely to jeopardize your career, for two reasons.

First, this manager will not be consistent in making decisions and following policy – this means you can not anticipate their behaviour.

Second, this manager is likely to lose status in the organization relative to people who know how to acquire power and use it effectively. Consequently, you are working for a weakened boss and may not get the resources or visibility you need to build your own career.

Personal Power Managers – provide a high sense of team spirit within the unit. However, the boss may have so estranged other departments that collaboration with people outside your unit will be difficult.

You may also find yourself forced to choose between the interests of your unit and the interests of the company as a whole. In the long term this can be dangerous to your career, especially if the Personal Power Manager leaves.

Power, Influence & Persuasion

Institutional Managers – Need power, more than they need to be liked! Institutional Managers deploy power in the service of the organization, and not in service of personal goals.

Generally, these managers:

- Are highly organization-minded
- Have a strong work ethic
- Willing to sacrifice some self interest for the welfare of the organizational goals.

So can you change your managerial style?

To do so, you must be aware of what your current style is – like it or not!

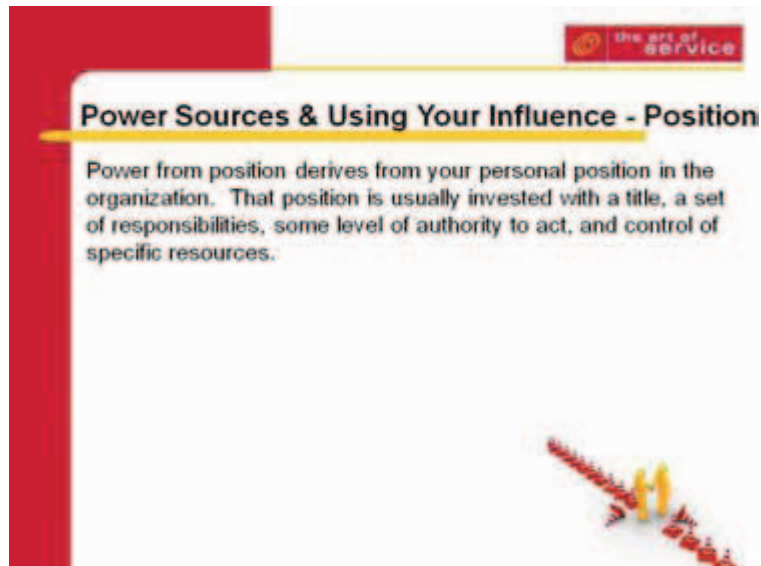
After awareness comes behavioral change. Identify and emulate a successful role model – someone who has the traits of your chosen style. If possible, get assigned to this role model as a subordinate or mentor. Take note of how they make decisions and work with their peers, superiors, and subordinates. Then imitate what you observe.

See The Power Profile, found on page 251 within this guide.

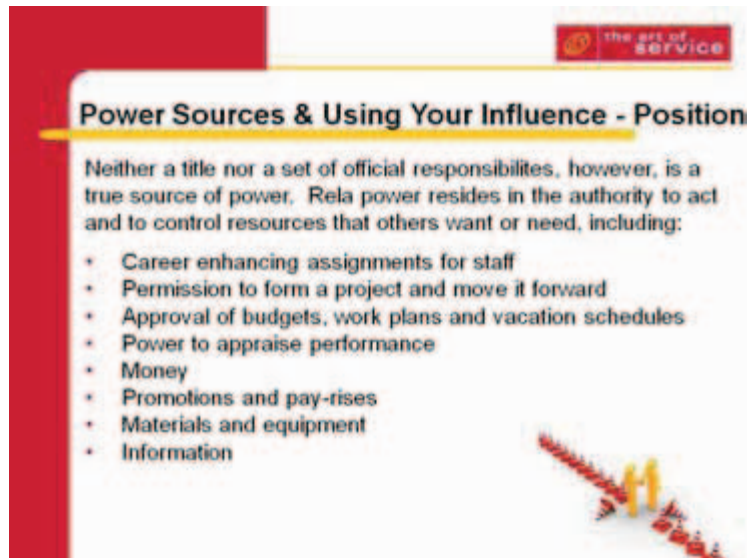


Power in organizations generally has three sources:

- Position;
- Relationships; and
- Personal.

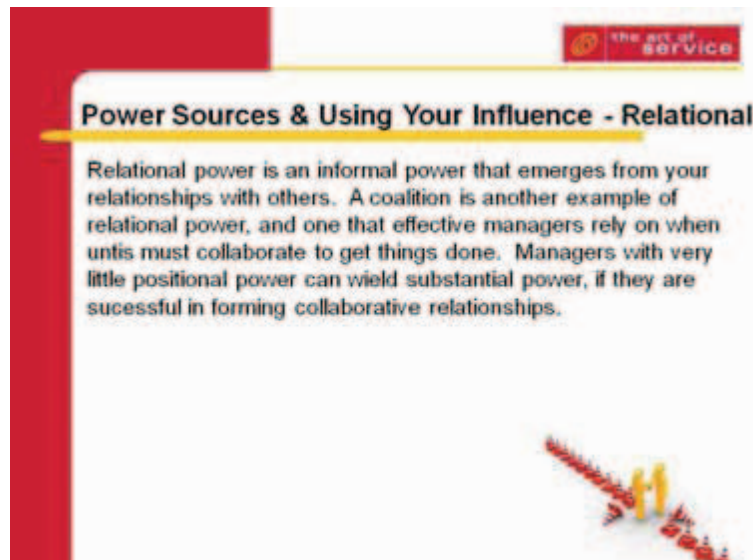


See The S Curve, found on page 255 within this guide.



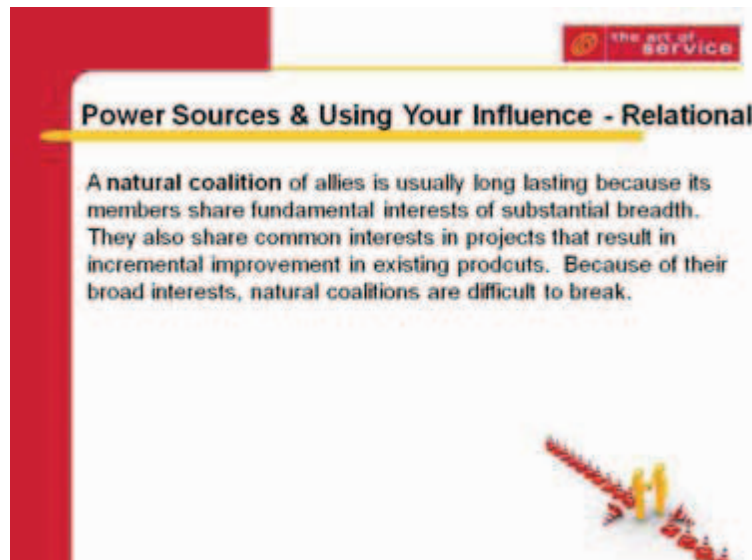
Tips for making the most of the power of position:

- Invoke positional power only when absolutely necessary. As a manager you depend on the help of other departments and your own subordinates to get jobs done – so use persuasion and other means wherever possible to get what you want;
- Be sure that you understand the boundaries of your positional power; and
- Defend your positional power from encroachment by others. Ambitious managers are always looking for ways to increase their power, don't allow them to at your expense.



There are 2 types of coalitions:

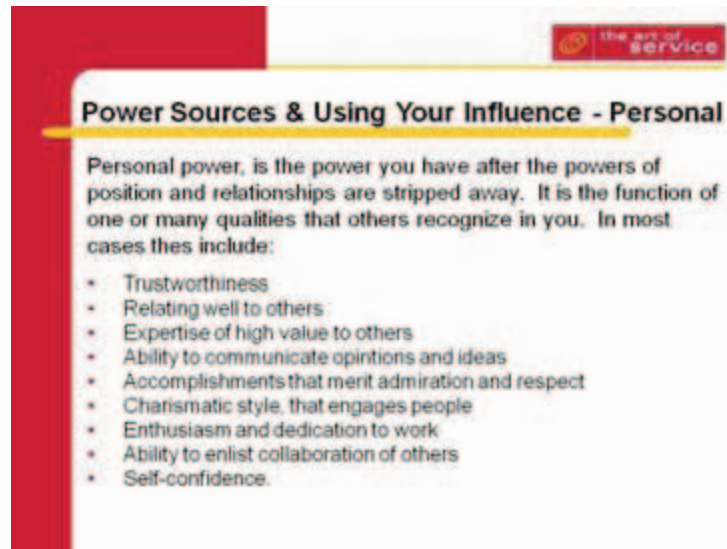
- Natural coalition – allies who share a broad range of common interests.; and
- Single coalition – parties that differ on other issues unite to support or block or single issue.



A **single - issue coalition** is generally less powerful because the basis for collaboration is more limited and the coalition forms around a fleeting issue. Consequently, the single-issue coalition is easier to defeat, especially if the other side can divide and conquer.

You can boost your relational power by joining coalitions of other employees who have broad and common agendas.

Think about the issues you are currently facing and how much more successful you could be, if part of a like-minded coalition.



The slide features a red vertical bar on the left and a red box in the top right corner containing the text 'the art of service' next to a small logo. The main title is 'Power Sources & Using Your Influence - Personal'. Below the title is a paragraph defining personal power, followed by a bulleted list of nine qualities.

Power Sources & Using Your Influence - Personal

Personal power, is the power you have after the powers of position and relationships are stripped away. It is the function of one or many qualities that others recognize in you. In most cases these include:

- Trustworthiness
- Relating well to others
- Expertise of high value to others
- Ability to communicate opinions and ideas
- Accomplishments that merit admiration and respect
- Charismatic style, that engages people
- Enthusiasm and dedication to work
- Ability to enlist collaboration of others
- Self-confidence.

The sum of your personal qualities is a measure of your personal power. That power makes it possible to lead the absence of formal authority and to influence the thinking and behavior of others over whom you have no organizational control.



The ability to get others to alter their behavior, want to improve, achieve company goals, and willingly perform is one of the key skills of all leaders.

There are certain 'influence tactics' that will help your ability to guide the people you work with to strive for and achieve excellence.

Tactics of Influence – Tactic 1

Creat a bright future:
People want a clear, simple-to-understand 'promised land' to which they can travel. The most effective way is to do this by painting a promising picture of the future. Find out what staff 'hot buttons' are.
For example:

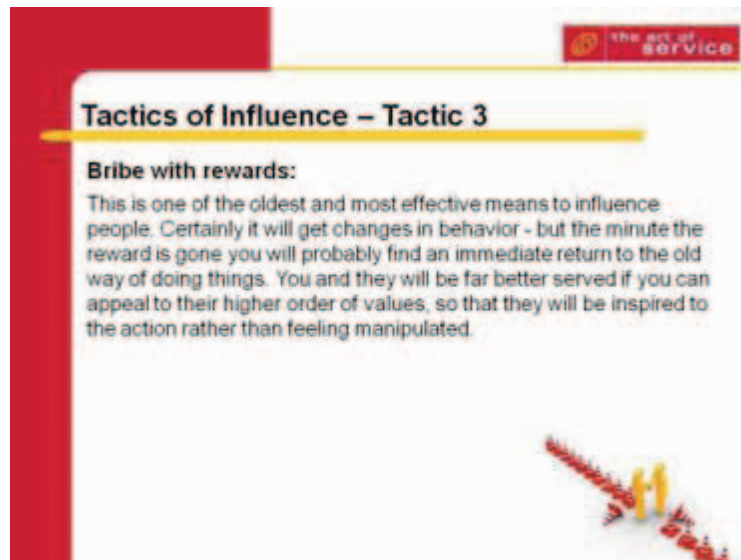
- The sense of making a difference
- Having control and mastery over their destiny
- Being involved in something bigger
- Feeling affiliated with others
- Feeling like they matter.



Tactics of Influence – Tactic 2

Creating a sense of urgency:

People need to have ignited within them a fire to move away from their current comfort zone. Present them with data and facts that ignite them emotionally so that they need to get active on whatever it is you are presenting to them.

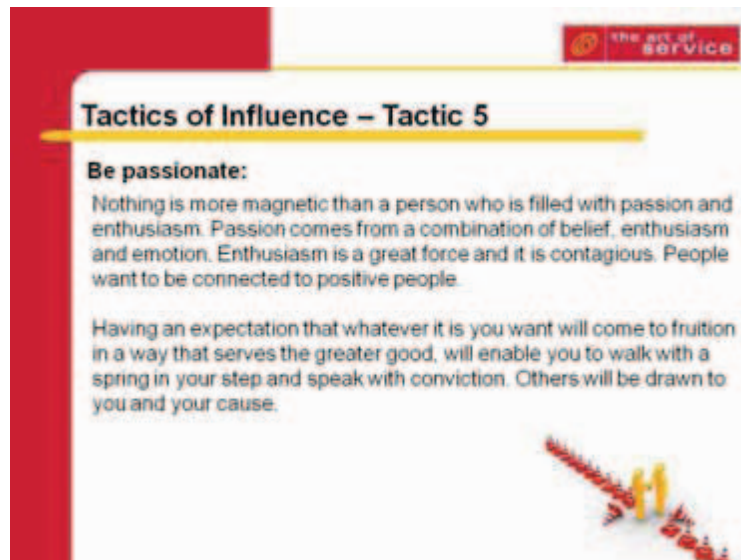


Tactics of Influence – Tactic 4

Be known for delivering results

Your capability to deliver results is paramount to people who are choosing whether or not to follow you. People will look to your previous performance to assess how much they can trust that what you are suggesting now will come to fruition. Have a reputation for being a person that can be trusted to deliver.

See Rewards Systems, found on page 237 within this guide.



Tactics of Influence – Tactic 6

Look after your people:

The number one need of all people is to be accepted and appreciated (another way of saying loved). And as a leader you can best meet this need by ensuring that people feel that YOU hear, understand, appreciate and include them. You do this by regularly being out there with your people in their world, talking with them, receiving information from them, and understanding their major obstacles and problems.

At the same time giving them information, helping them to see things in a new light or maybe understand more fully the reasons for a decision, or whatever is topical in your business right now. Importantly it is about you being out there with people and connecting at a real level, not just superficially.

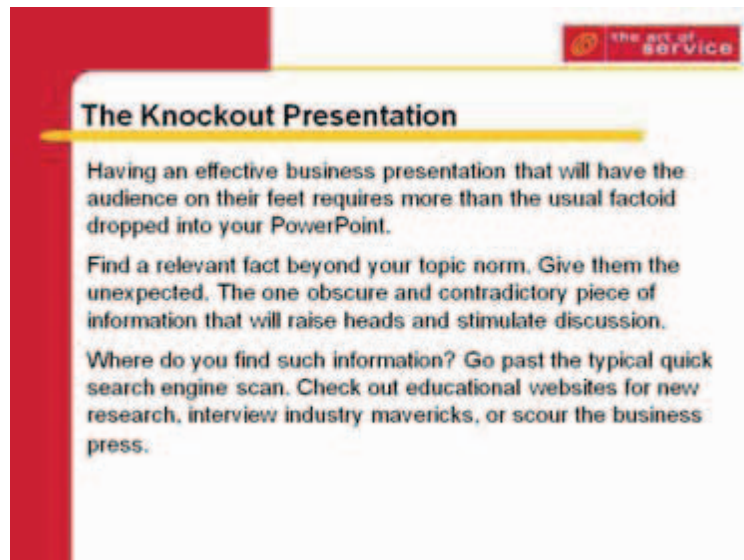


Formal presentations are a powerful way to communicate your message about important HR programs and ideas and to persuade your audience to embrace your ideas.

Keep a logical flow to presentations:

- Introduction;
- Narrative; and
- Summary/Conclusion.

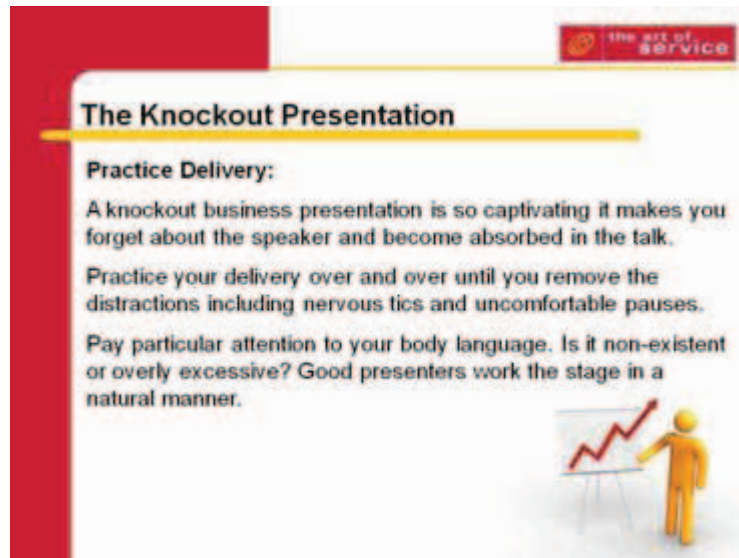
See Implementation Tools on page 259 and Avoiding Presentation Fright and Common Pitfalls, found on page 265 within this guide.



Avoid Info Overload:

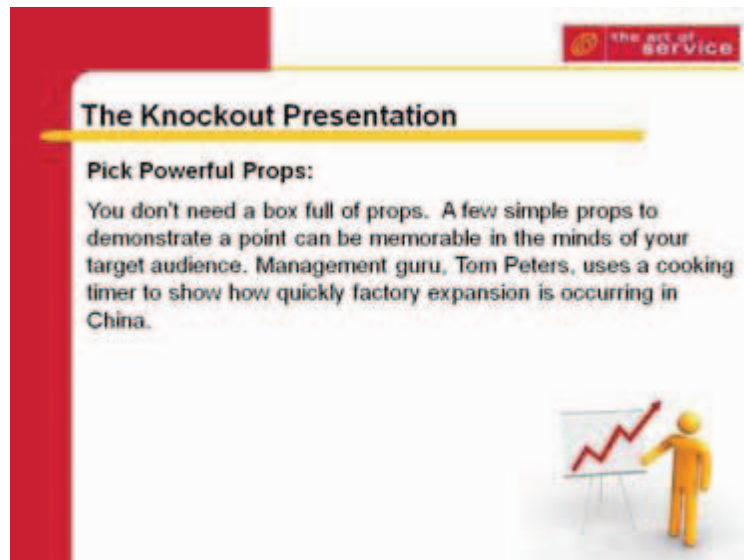
PowerPoint expert Cliff Atkinson, author of *Beyond Bullet Points* says, "When you overload your audience, you shut down the dialogue that's an important part of decision-making."

He points to some important research by educational psychologists. When you remove interesting but irrelevant words and pictures from a screen, you can increase the audience's ability to remember the information by 189per cent and the ability to apply the information by 109per cent.



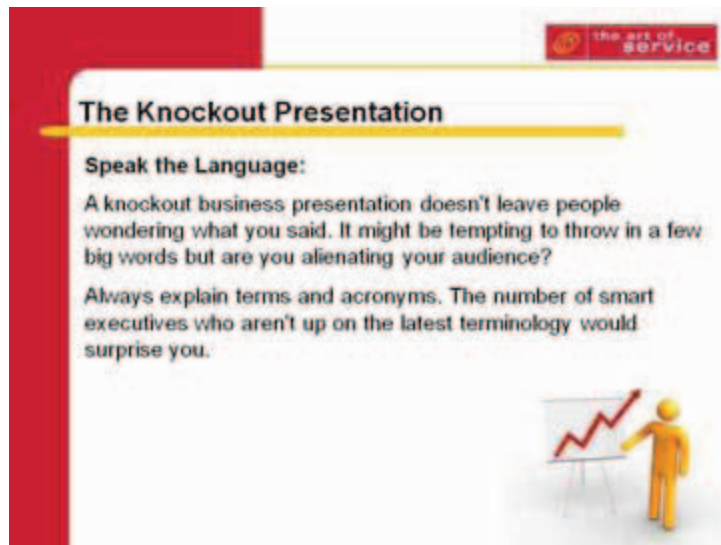
Forget comedy:

Business presenters will flirt with the temptation to deliver the stand up humor of Chris Rock. Remember your audience didn't come to laugh; this is a business presentation. Leave your jokes at home. It's ok to throw in a few natural off the cuff laughs but don't overdo it.



Minimize You:

PowerPoint expert Cliff Atkinson says, “Frankly, your audience doesn't care as much about your company history, as they do about whether you can help them solve the specific problems they face. Write a script for your presentation that makes the audience the protagonist, or the main character, which faces a problem that you will help them to solve.”



Simple Slides:

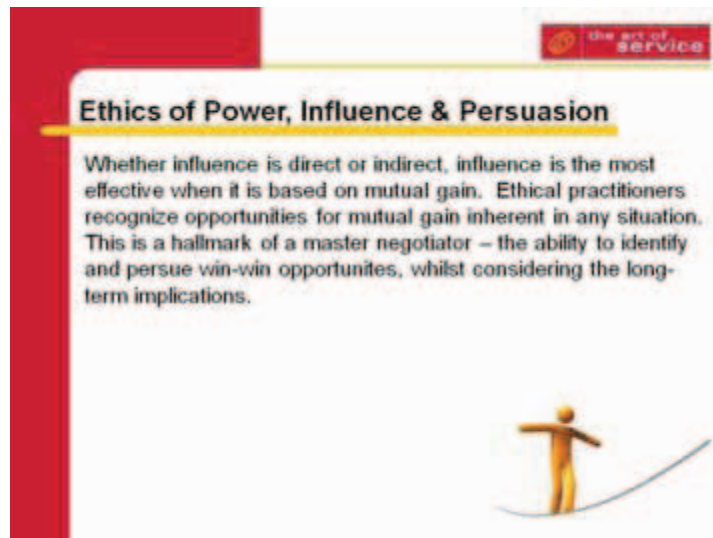
Many corporate brains will turn off at the sight of yet another complicated Visio document or overworked PowerPoint presentation. Over 400 million desktops currently have the PowerPoint application. If you want your business to stand out, don't be like everyone else. Use slides in your knockout presentation to highlight and emphasize key points. Don't rely on your slide projector to run the show.



Yes, power has the capacity to corrupt, but power is necessary to the functioning of organizations and society. So how do we get the latter and not the former?

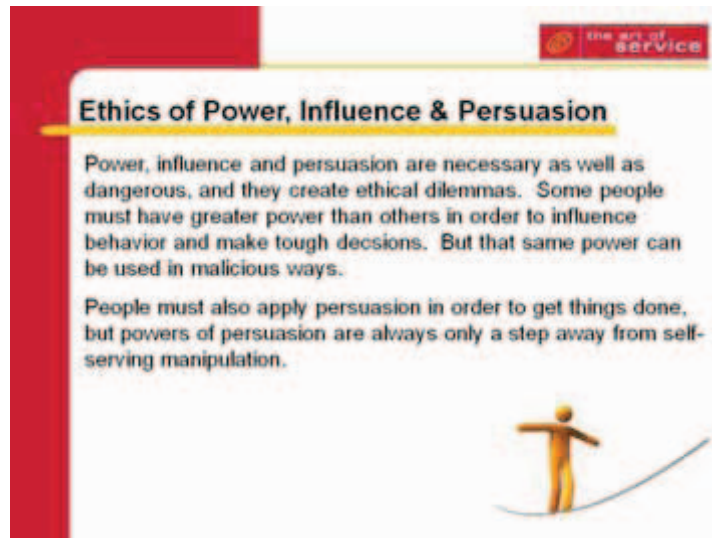
The solution is the ethical use of power. Power used ethically conforms to these two standards:

- It is exercised to benefit the entity from which power is derived and that it is responsible to serve; and
- It conforms to cultural and legal standards of ethical behavior.



Examples of unethical influence:

- Exaggerating your demands in negotiation, knowing you can settle for less and still achieve your goals;
- Concealing your true intentions in order to influence a better outcome for yourself; and
- Deliberately providing false information to gain advantage.



Top management and corporate boards can reduce or eliminate ethical dilemmas by:

- Aligning company policies and standards with the highest legal and ethical expectations and behavior;
- Zealously enforcing policies and standards;
- Including ethical performance in appraisals; and
- Acting as visible models of ethical behavior.

See The Power Profile, found on page 251 within this guide.

Ethics of Power, Influence & Persuasion

Top management and corporate boards can reduce or eliminate ethical dilemmas by:

- Aligning company policies and standards with the highest legal and ethical expectations and behavior.
- Zealously enforcing policies and standards.
- Including ethical performance in appraisals.
- Acting as visible models of ethical behavior.





MANAGING CHANGE



In managing change, the first key is to know to what extent the change will be resented or rejected on one hand, and accepted or welcomed on the other hand. If everyone is enthused about it – proceed immediately.

If there is resentment and resistance, reconsider the decision and if you are sure it is the right move, proceed with caution and obtain acceptance along the way.

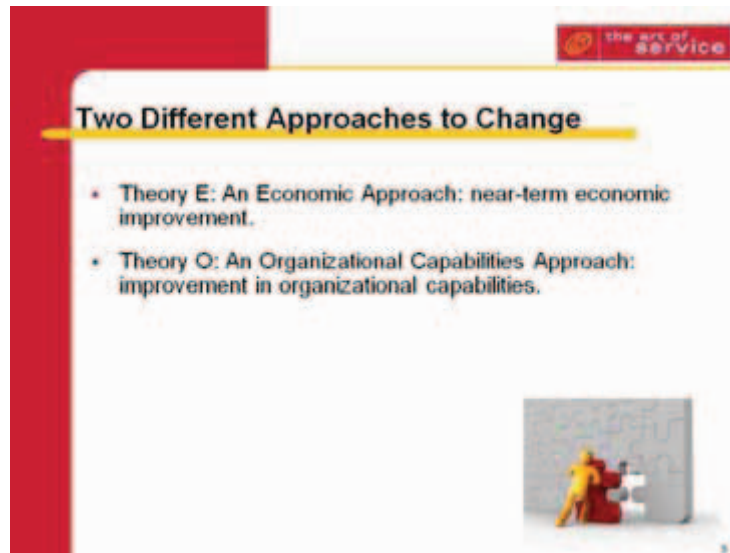
See Managing Change Effectively, found on page 269 within this guide.



Types of Change

There are many different types of change that can be categorized into:

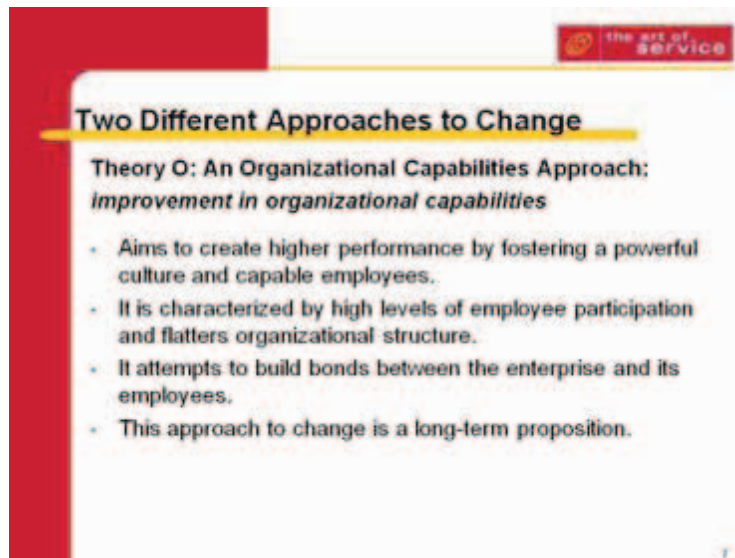
- Structural changes;
- Cost cutting changes;
- Process changes; and
- Cultural changes.



Two Different Approaches to Change

Theory E: An Economic Approach: *near-term economic improvement:*

- Aims for a dramatic and rapid increase in shareholder value;
- It is driven from the top of the organization and makes heavy use of outside consultants; and
- It relies heavily on cost-cutting, downsizing, and asset sales to meet its objectives.



Two Different Approaches to Change

Theory O: An Organizational Capabilities Approach:
improvement in organizational capabilities

- Aims to create higher performance by fostering a powerful culture and capable employees.
- It is characterized by high levels of employee participation and flatters organizational structure.
- It attempts to build bonds between the enterprise and its employees.
- This approach to change is a long-term proposition.



Two Different Approaches to Change

Key Factors in Theory E and Theory O Change			
Dimensions of change	Theory E	Theory O	Theories E and O combined
Goals	Maximize shareholder value	Develop organizational capabilities	Embrace the paradox between economic value and organizational capability
Leadership	Manage change from the top	Encourage participation from the bottom up	Set direction from the top and engage the people below
Focus	Emphasize structure and systems	Build up corporate culture, employees, behavior and attitudes	Focus simultaneously on the hard (structures and systems) and the soft (corporate culture)
Process	Plan and establish programs	Experiment and evolve	Plan for spontaneity
Reward system	Motivate through financial incentives	Motivate through commitment; use pay as fair exchange	Use incentives to reinforce change but not to drive it
Use of consultants	Consultants analyze problems and shape solutions	Consultants support management in shaping their own solutions	Consultants are expert resources who empower employees

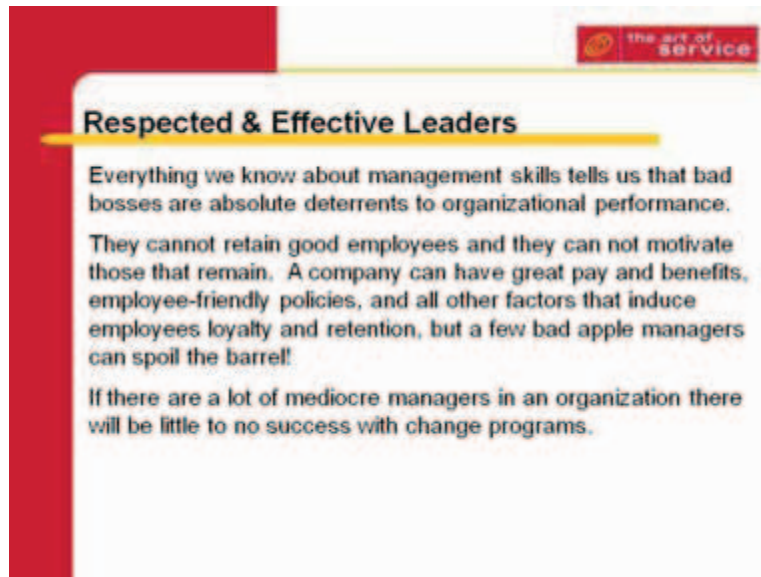
Source: Michael Beer and Neil Holme, "Cracking the Code of Change", Harvard Business Review, 78, no. 3 (May-June 2000): 137.



Is your organization 'Change Ready'?

Change ready means that the people and structure of the organization are prepared for and capable of change. An organization is change ready, when 3 conditions are present:

- Leaders are respected and effective;
- People feel personally motivated to change; and
- The organization is nonhierarchical and people are accustomed to collaborative work.



Respected & Effective Leaders

Everything we know about management skills tells us that bad bosses are absolute deterrents to organizational performance. They cannot retain good employees and they can not motivate those that remain. A company can have great pay and benefits, employee-friendly policies, and all other factors that induce employees loyalty and retention, but a few bad apple managers can spoil the barrel!

If there are a lot of mediocre managers in an organization there will be little to no success with change programs.

Many successful change programs grow out of crisis. However, change leaders should raise concerns about current, problematic situations, and urge management to challenge the complacency that fosters it – without resorting to ‘crisis-mode’ tactics:

- Use information about the organization’s competitive situation to generate discussion with employees about current and prospective problems; and
- Create opportunities for employees to educate management about the dissatisfaction and problems they experience.

See Organizational Behavior Survey, found on page 145 within this guide.



The slide features a red vertical bar on the left and a logo in the top right corner that reads 'the art of service'. The title 'Respected & Effective Leaders' is underlined in yellow. Below the title, there are four bullet points:

- Use information about the organization's competitive situation to generate discussion with employees about current and prospective problems.
- Create opportunities for employees to educate management about the dissatisfaction and problems they experience.
- Create dialogue on the data.
- Set high standards and expect people to meet them.

In the bottom right corner of the slide, there is a small 3D illustration of a yellow figure sitting at a desk with a computer monitor and keyboard.

Many successful change programs grow out of crisis. However, change leaders should raise concerns about current, problematic situations, and urge management to challenge the complacency that fosters it – without resorting to ‘crisis-mode’ tactics:

- Use information about the organization’s competitive situation to generate discussion with employees about current and prospective problems; and
- Create opportunities for employees to educate management about the dissatisfaction and problems they experience.

Not change ready?

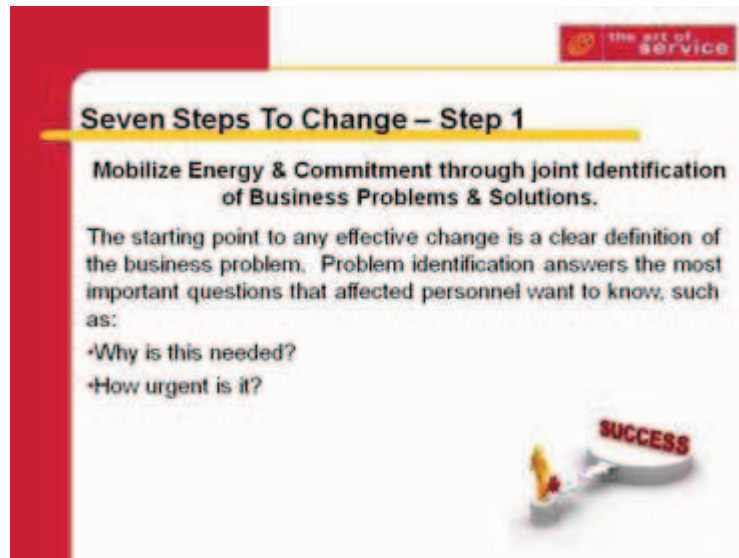
If your organization is not change ready, there are steps you can take to push closer to the goal.

- Do a unit-by-unit change-readiness assessment.
- Develop more participative approaches to how 'everyday business is handled'.
- Give people a voice.
- Drive out fear.





In 1990, Michael Beer and his colleagues identify a number of steps that general managers at business unit levels can use to create real change. Those steps are known as the 7 Steps of Change.



Seven Steps To Change – Step 2

Develop a Shared Vision of How to Organize and Manage for Competitiveness.


The people in charge of the change must develop a clear vision of an altered and improved future.

They must also communicate the vision, be specific about how the change will improve the business, and explain how the improvements will benefit employees.

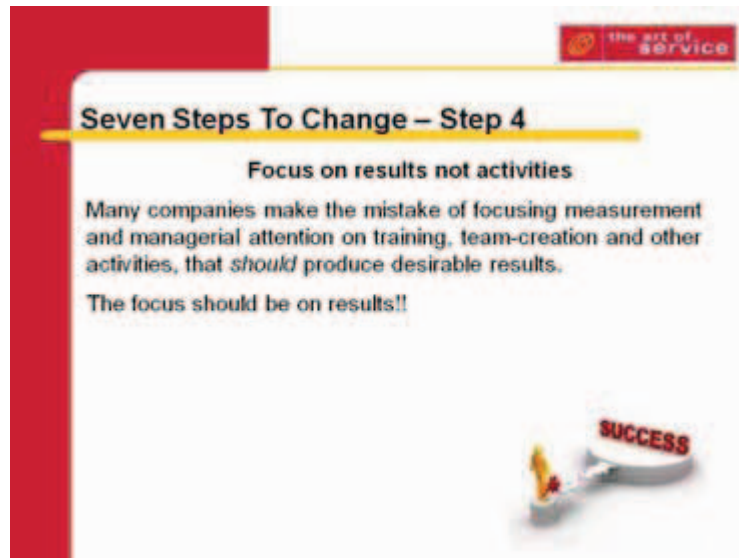
Seven Steps To Change – Step 3

Identify the Leadership

It is essential to have a visible leader and sponsor of a change, someone who owns and leads the change initiative. The leadership must act as champion, assemble the resources needed and take responsibility for success or failure.



See Mapping Responsibilities, found on page 149 within this guide.



Seven Steps To Change – Step 5

Start Change at the Periphery, Then let it spread to other units without Pushing it from the Top.

The likelihood of success is greatest when change is instigated in small, fairly autonomous units. Changing an entire organization at once is more difficult and less likely to succeed.

Once change on a smaller scale is accomplished and witnessed by employees in adjacent units, diffusion of the change initiative throughout the organization is more likely.

See KPIs, found on page 223 within this guide.



Seven Steps To Change – Step 7

Monitor and Adjust Strategies in Response to Problems in Change Process:

- Remember that some people will quit;
- Some elements of your change agenda will fail and competitors may change their tactics; and
- Be flexible.



Once people are convinced that change is necessary, and that the change vision is the right one, it's time to move forward with implementation. Implementation rarely proceeds smoothly.



The slide features a red vertical bar on the left and a red header box in the top right corner containing the text "the art of service" next to a small logo. The main title "Implementation" is underlined in yellow. Below the title, two steps are listed in black text. At the bottom right, there is an illustration of three stylized human figures in yellow, blue, and red pushing together large puzzle pieces.

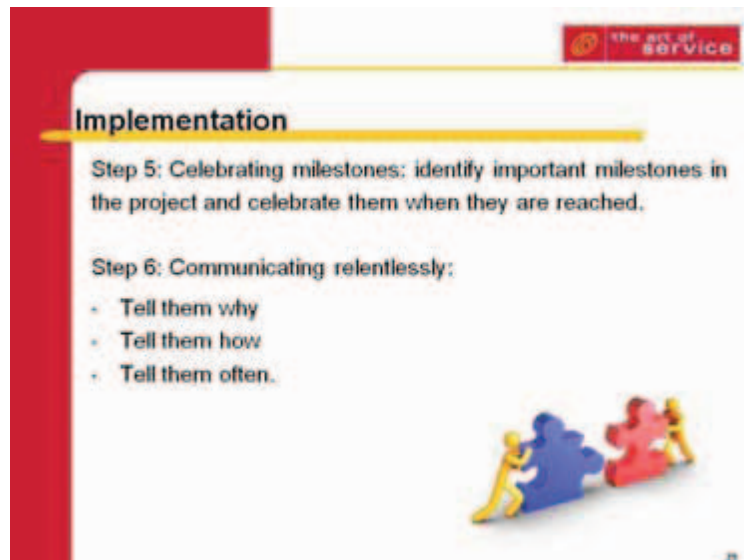
Implementation

Step 1: Enlist the support and involvement of key people: This means assembling a team with the right blend of skills, authority, resources, and leadership.

Step 2: Crafting a Good Implementation Plan: Remember to keep it simple, flexible, divided into achievable chunks, and with clearly defined roles and responsibilities.

Step 3: Supporting the plan with consistent behavior: Make sure that management “walks the talk”.

Step 4: Developing “enabling structures”: This means training, pilot programs, and alignment of the rewards system with your change goals.




The slide features a red vertical bar on the left and a yellow horizontal bar at the top. In the top right corner, there is a logo with a red circle containing a white 'S' and the text 'the act of SERVICE'. The main title 'Implementation' is underlined in yellow. Below it, Step 5 is followed by Step 6, which includes a bulleted list. At the bottom right, there is an illustration of three interlocking puzzle pieces in yellow, blue, and red, with small human figures on top of them.

Implementation

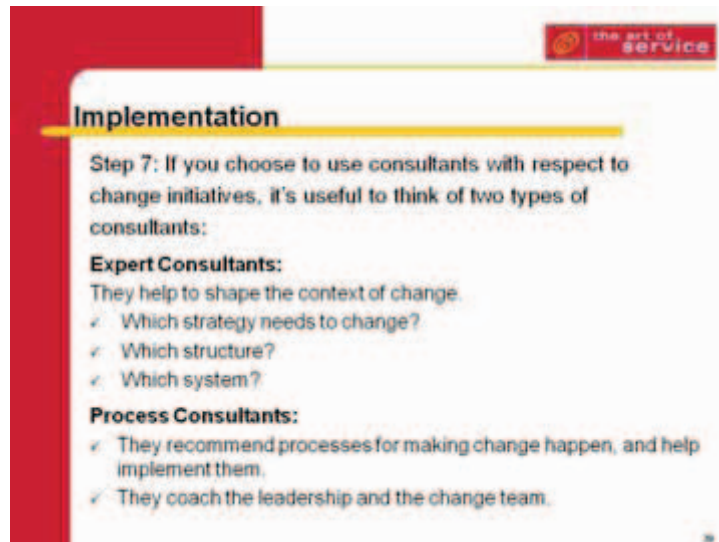
Step 5: Celebrating milestones: identify important milestones in the project and celebrate them when they are reached.

Step 6: Communicating relentlessly:

- Tell them why
- Tell them how
- Tell them often.



See KPIs, found on page 223 within this guide.



Step 7 continued: Consultants should use a methodical plan/model of attack:

Example Consultancy Model:

- Diagnosis;
- Capabilities Assessment;
- Strategy Development; and
- Implementation.

Implementation

How consultants should participate is generally a function of the type of change you are aiming for:

If the change is restructuring, with the purchase, sale, and/or consolidation of units, consultants will play a large role.

If the change involves how people work together, company personnel should be prepared to carry the burden of leadership.





BUSINESS RELATIONSHIP MANAGEMENT



Customers own and operate configurations of assets to create value for their own customers. The assets are a means of achieving outcomes that enable or enhance value creation.



For the sake of clarity, outcomes are classified and codified with reference tags that can be used in various contexts across the Service Lifecycle.



See example BRM job description on page 273 and BRM Relationship Management Responsibilities, found on page 275 in this guide.



Internal IT Service Providers need this role to develop and be responsive to their internal market. They work closely with Product Managers who take responsibility for developing and managing services across the lifecycle.

They are 'product focused' and perceive the environment through a Service Portfolio



Outcomes that are presently well supported are periodically reviewed. New opportunities emerge when changes in the business environment cause a well-supported outcome to become poorly supported.

See example BRM Metrics and Reports, found on page 279 in this guide.



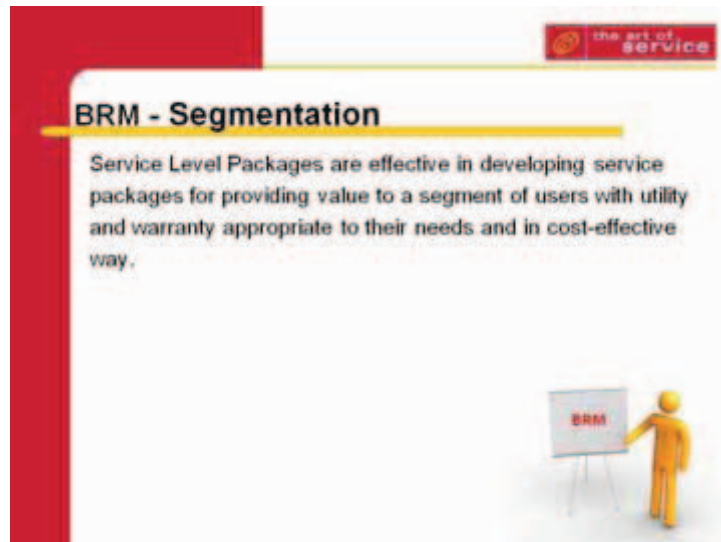
Business Relationship Management (BRM)

An outcome-based definition of services ensures that managers plan and execute all aspects of service management entirely from the perspective of what is valuable to the customer.

Such an approach ensures that services not only create value for customers but also capture value for the service provider.




Service Level Packages are effective in developing service packages for providing value to a segment of users with utility and warranty appropriate to their needs and in cost-effective way.

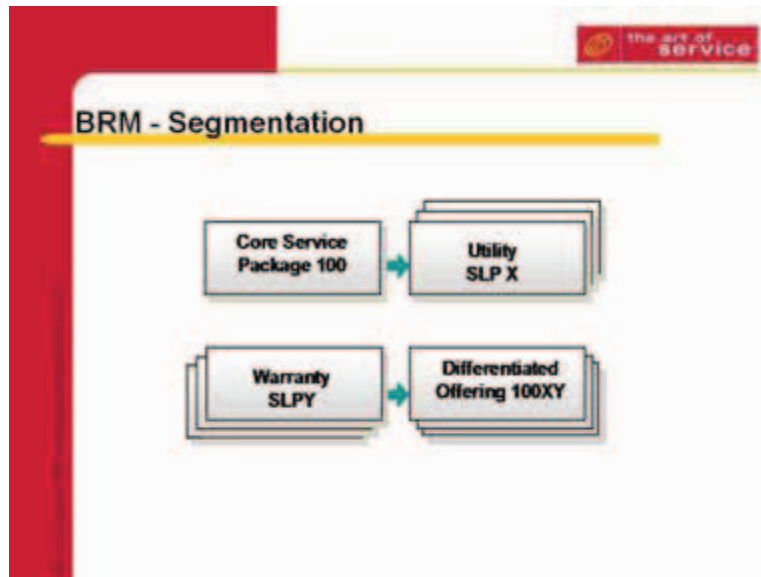


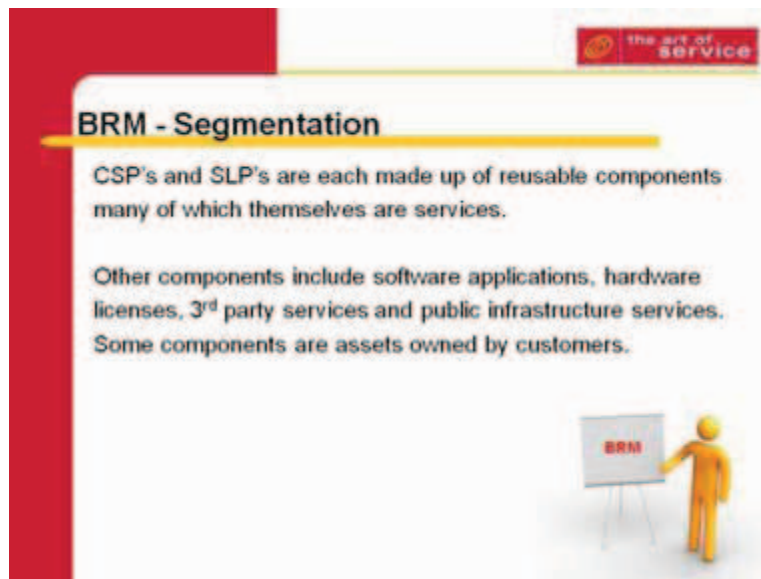
the art of service

BRM - Segmentation

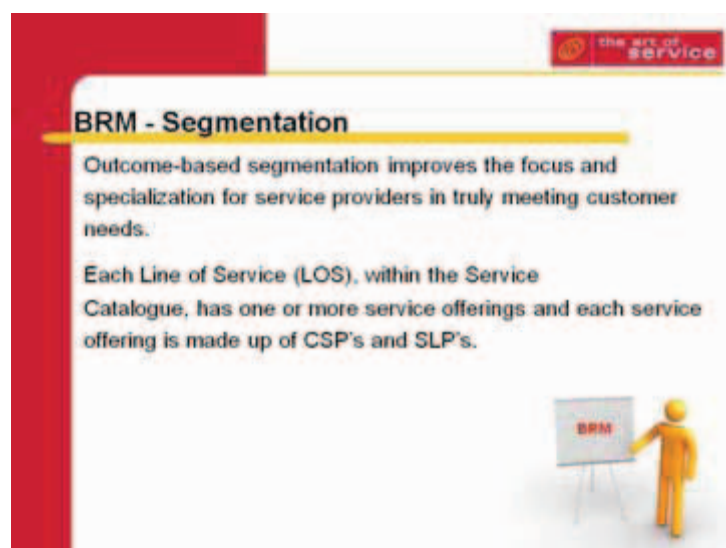
Service Level Packages are effective in developing service packages for providing value to a segment of users with utility and warranty appropriate to their needs and in cost-effective way.








Making component services visible to customers on the Service Catalogue is a matter of policy with respect to pricing and bundling of services. Risks have to be considered for decisions on expanding the Service Catalogue.



This modular approach provides multiple control perspectives within the Service Lifecycle. It is the responsibility of the Business Relationship Manager (BRM) to identify the most suitable combination of LOS and SLP for every customer outcome they are concerned with.


See example Mapping Responsibilities, found on page 149 in this guide.



BRM - Segmentation

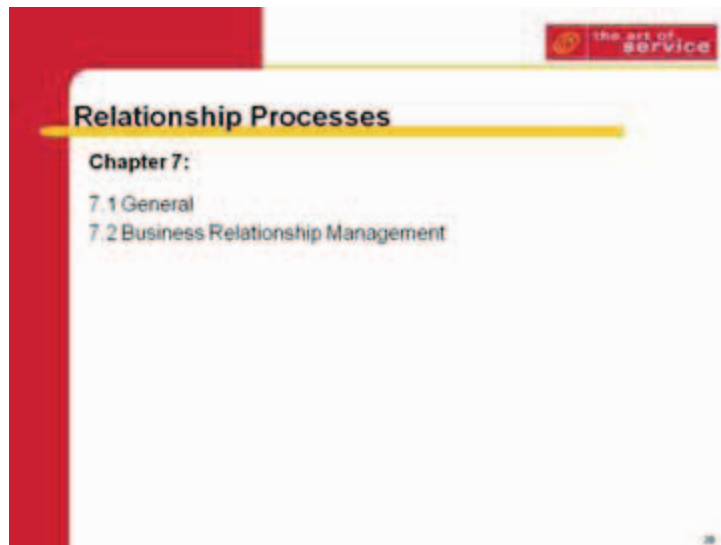
This component based approach greatly reduces the cost of providing services while maintaining high levels of customer satisfaction.

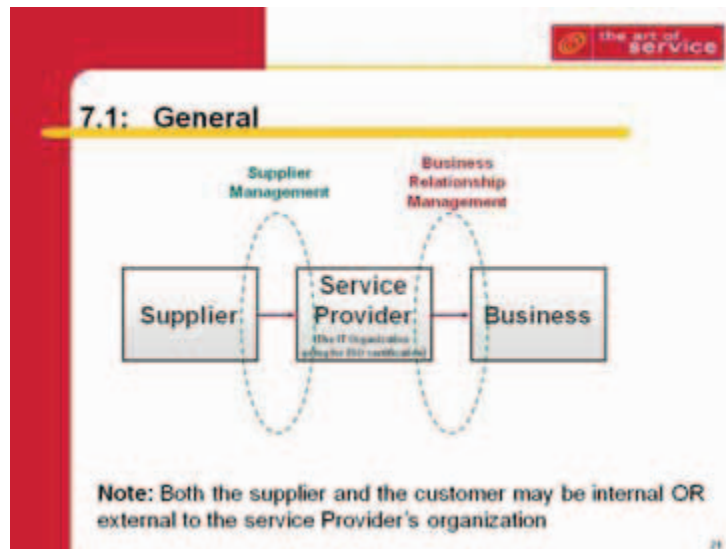
BRM's represent customers and work closely with Product Managers to ensure that the Service Catalogue has the right mix of LOS and SLP to fulfill the needs of the Customer Portfolio.





Business Relationship Management is also a process found within the ISO 20000 standard. Whether you choose to work towards attaining this standard or not, the 'shall' and 'should' criteria provide an excellent quality framework.





Business Relationship Management

This modular approach provides multiple control perspectives within the Service Lifecycle. It is the responsibility of the Business Relationship Manager (BRM) to identify the most suitable combination of LOS and SLP for every customer outcome they are concerned with.



Part 1:

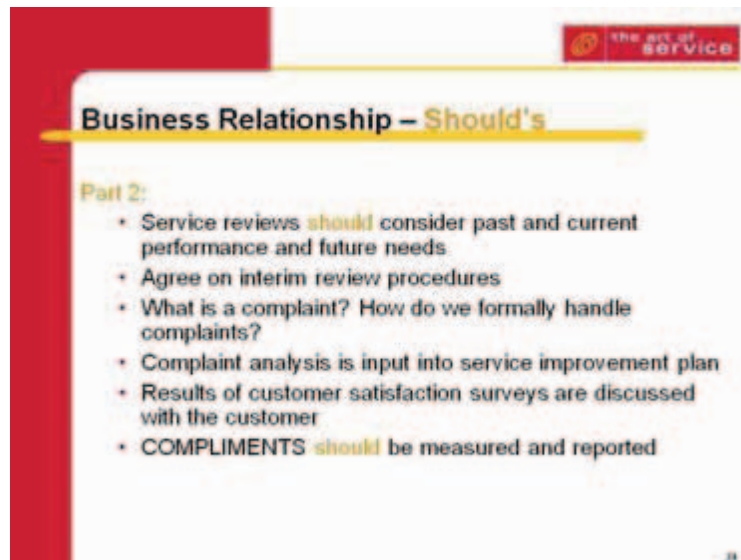
Identify and document the stakeholders and customers

Service provider AND customer **shall** attend a service review ANNUALLY

Changes to contracts and SLA's **shall** be subject to Change Management

There **shall** be a named individual responsible for managing customer satisfaction and the whole business relationship process

Feedback is gathered and customer satisfaction is measured → results are input in to service improvement plan.



Business Relationship – Should's

Part 2:

- Service reviews **should** consider past and current performance and future needs
- Agree on interim review procedures
- What is a complaint? How do we formally handle complaints?
- Complaint analysis is input into service improvement plan
- Results of customer satisfaction surveys are discussed with the customer
- COMPLIMENTS **should** be measured and reported

SUPPORTING DOCUMENTS

Through the documents, look for text surrounded by << and >> these are indicators for you to create some specific text.

Watch also for highlighted text which provides further guidance and instructions.



ORGANIZATIONAL BEHAVIOR AND LEADERSHIP GUIDE

ORGANIZATIONAL BEHAVIOR SURVEY

Instructions: This questionnaire contains statements about the organization. Next to each question indicate how rarely or often your organization displays each behavior by using the following scoring system:

- 1 - Almost Never;
- 2 – Seldom;
- 3 – Occasionally;
- 4 – Frequently; and
- 5 - Almost always.

1. Things get accomplished around here because employees fear for their jobs.
2. Most employees do not leave this organization because it provides a lot of security.
3. The managers display real leadership traits and are respected by the employees.
4. There is a real feeling of teamwork.
5. Only Management is allowed to make decisions.
6. Although the employees are happy and contented, they give only passive cooperation.
7. Both managers and employees want to create better job performance.
8. There is a partnership between managers and employees.
9. Although people obey their leader, they do not respect the leader.
10. Management's main concern is too making money.
11. The employees feel they are part of the organization.
12. The employees feel a real responsibility to make things work.
13. Most of the jobs are considered "minimum wage" jobs.
14. The employees' main concern is for the security of their families and themselves.
15. When things go wrong, the main concern is to fix it, not to lay blame.
16. There is enthusiasm among the employees to better job performance.

ORGANIZATIONAL BEHAVIOR AND LEADERSHIP GUIDE

17. The employees' main concern is to provide for their families and themselves.
18. Although the employees have good benefits, they tend to give only minimal performance.
19. The employees feel they are recognized for their work.
20. The employees feel their jobs hold high esteem and are of great value to the organization.
21. Management does not expect the employees to give more than minimal performance.
22. Most of the employees seem content to stay in their position.
23. Employees are part of the decision making process.
24. Things happen around here because of the self-discipline of every employee.

In the fill-in lines below, mark the score of each item on the questionnaire. For example, if you scored item one with a 3 (Occasionally), enter a 3 next to Item One. When you have entered all the scores for each question, total each of the four columns.

Item Score	Item Score	Item Score	Item Score
1. _____	2. _____	3. _____	4. _____
5. _____	6. _____	7. _____	8. _____
9. _____	10. _____	11. _____	12. _____
13. _____	14. _____	15. _____	16. _____
17. _____	18. _____	19. _____	20. _____
21. _____	22. _____	23. _____	24. _____
TOTAL _____	TOTAL _____	TOTAL _____	TOTAL _____
Autocratic	Custodial	Supportive	Collegial

ORGANIZATIONAL BEHAVIOR AND LEADERSHIP GUIDE

- **Autocratic** - This stage depends on power, those in command have the power to demand. "You do this or else," means that an employee will obey or be penalized. The employee orientation is obedience towards the boss, not respect;
- **Custodial** - These are welfare companies that practice paternalism. The organization depends on economic recourses to meet the security needs of its employees which lead to dependence upon the organization;
- **Supportive** - This approach depends upon leadership instead of power or money. Through leadership the organization helps the employee to grow and accomplish things in the organization; and
- **Collegial** - This is a team concept that depends upon the management building a partnership with employees.

This questionnaire is to help you assess what behavioral model your organization operates. It is based upon the theory that organizations generally operate out of one of four modes - Autocratic, Custodial, Supportive, or Collegial. The lowest score possible for a model is 6 (Almost never) while the highest score possible for a model is 30 (Almost always).

The highest of the four scores indicates what model you perceive your organization to normally operate in. If your highest score is 24 or more, it is a strong indicator of the model it operates in.

The lowest of the three scores is an indicator of the stage your team is least like. If you're lowest score is 12 or less, it is a strong indicator that your organization does not operate this way.

If two of the scores are close to the same, you are probably going through a transition phase. If there is only a small difference between three or four scores, then this indicates that you have no clear perception of the way your organization behaves, or the organization's behavior is highly variable.

ORGANIZATIONAL BEHAVIOR AND LEADERSHIP GUIDE

Also note that if several scores are close to being the same, then the one on the right could be stage that you company primarily operates out of. That is a collegial company could have patterns of both custodial and supportive organizations.

MAPPING RESPONSIBILITIES

Understanding 'who does what'.

Achieving ISO/IEC 20000 requires roles and responsibilities to be clearly defined. Clarity on 'who does what' avoids confusion, variations in processes that ought to be consistent, and inefficiency in delivery of the service. This is particularly important if roles and responsibilities need to change, as they often will when a service provider is aiming for the kind of best practice model specified in ISO/IEC 20000.

ISO/IEC 20000 recognizes that each service provider may implement and allocate roles differently. It does not specify how roles and responsibilities should be documented; matrices, in various forms can be used for this.

Techniques

Matrices can be used to supplement job descriptions and process procedure documentation, see Tables 1-6 for examples. Responsibility matrices provide a compact, concise and easily managed method of tracking who does what in each process and between processes, which is better than a large volume of text.

The examples given in Tables 1-6 are used by real service providers, and re tuned to their needs and environments. They have included illustrating the use of responsibility matrices and are not generic nor are they models for another service provider to adopt.

Specific examples of responsibility matrices are also available in best practice material, such as that found in ITIL®

The examples included are samples from the service level management and service reporting processes. In the example shown the service review is used to describe the customer's future business plans and needs and the current operational service. Each entry could be broken down further to lower levels of detail in a logical

ORGANIZATIONAL BEHAVIOR AND LEADERSHIP GUIDE

hierarchy to map onto a procedure or even to clarify responsibilities at work instruction level.

Matrices such as those in Tables 2-6 will help a service provider meet the ISO/IEC 20000 requirements for competence, awareness and training.

Table1 – Key to abbreviations for Tables 2- 4

Abbreviation	Role	Description
BRM	Business Relationship Manager	Person responsible for the relationship with the business. Has overall responsibility for the relationship with the customer and for customer satisfaction.
IM	Incident Manager	Person responsible for the effectiveness of the incident management process.
OM	Operational Manager	Person responsible for managing delivery of a service team. Has line management responsibility for staff delivering that service.
SLR	Service Level Reporting Team	People documenting service level achievement and explanation of exceptions.
What? ...states what needs to be achieved		
When? ...explains when the particular process/procedure must be followed		
Why? ...explains why the practice exists and how it has been developed		

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How?...explains how the practice is achieved

Who?...tells which members of the team are responsible

Table 2 – Service Review Meetings

Responsibility	What	When	Why	How	Who
Service Review Meetings	Customer: hold meetings, document appropriately, monitor and own actions	As appropriate but within published schedule	To: <ul style="list-style-type: none"> • ensure service level agreement (SLA) reflects customers needs; • ensure agreed services are met; • provide audit trail of issues/actions 	Define agenda, dates, participants	BRM OM
	Internal: hold meetings, document appropriately, monitor and own actions	As appropriate but within published schedule.	To: <ul style="list-style-type: none"> • Ensure SLA reflects customer's needs; • Ensure agreed services are met; • Provide audit trail of actions; • Encourage participation/te 	Define agenda, dates, participants	BRM OM

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			<p>am work;</p> <ul style="list-style-type: none"> • Understand customer's business plans; • Incorporate internal planning 		
--	--	--	--	--	--

Table 3 – Service Level Reporting

Responsibility	What	When	Why	How	Who
Service Level Reporting	Design and content awareness	Start of responsibility/SLA changes	In order to ensure that report is accurately measuring SLA's	Review report and cross-referenced with SLA	BRM OM
	Production	As per contract	To produce an accurate report	Using internal SLR team procedures Management summary from BRM/OM	SLR OM
	Verification	After production of report	To ensure that data contained within report is accurate and complete	Review report	SLR OM

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	Delivery	As per SLA	To provide customer with SLA measurement information	Electronic and/or paper bound report distributed	SLR IM BRM
--	----------	------------	--	--	------------------

Table 4 – Incident and internal reports

Responsibility	What	When	Why	How	Who
Incident reports	Production	Upon request of BRM/customer/IM or as detailed within SLA	To detail impact, and to action prevention of recurrence	Standard format on incident report database	IM OM
	Delivery	Within 5 working days of incident or as detailed within SLA	To cascade information to customer and internal support teams	Electronic/paper bound report distributed. Review content with BRM prior to distribution	IM BRM
	Sign-off	As timetabled	To ensure that planned actions are	Review status with	IM

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		in the incident report	carried out by the business	OM's until all actions closed	
Internal report (for delivery team)	Production	Within agreed timescales	Inform line manager on service and financial status	Commercial internal report template	BRM Team Leaders

RACI Matrices

Matrices that identify who are accountable, responsible, consulted or informed (ARCI) are also useful. These are generally referred to as RACI matrices.

Differences in RACI roles

The differences in roles are normally based on guidelines such as:

- **Accountable** (e.g. the buck stops here):
 - Person with YES/NO authority, sign-off, approval, veto; and
 - Should be no more than 'one per row';

- **Responsible** (e.g. the doer):
 - Takes initiative to accomplish a task/function/decision;
 - Develops alternatives; and
 - Consults and informs others.

- **Consulted** (e.g. kept in the loop):
 - Asked for input prior to decision/action;
 - Part of two-way communication; and
 - Can be initiated or solicited.

- **Informed** (e.g. keep in the picture):
 - Told about a decision/action usually after the fact;
 - Permission is not sought from this person;
 - One-way communication; and
 - May be prior to going public to a wide audience.

The accountable, responsible, consulted and informed states can be mapped against each process or sub-process, and used in conjunction with a process map or a procedure. Documenting roles and responsibilities this way reduces some of the ambiguity that can arise from a purely text-based description. Table 5 given an example matrix for the change management process.

A lower level of detail may be useful for each of the tasks shown in the matrix in Table 5. An example of a lower level is given in Table 6 for task number four: 'Build, test and implement change'.

Table 5 – ARCI matrix example (level 1)

Task	Accountable	Responsible	Consulted	Informed
1. Log request for change (RFC)	Change initiator	Change initiator		
2. Categorize RFC	Change Manager	Change Manager	Configuration Manager	
3. Assess, appraise and schedule RFC	Change Manager	Change Manager	Configuration Manager	
4. Build, test and implement change	Implementation Manager	Implementation Manager	Change Manager	Configuration Manager
5. Verify and close	Change Manager	Change Manager	Configuration Manager	

Table 6 – ARCI matrix example (level 2)

Task	Accountable	Responsible	Consulted	Informed
4.1 Build change	Development Manager	Development Manager	Change Manager	Configuration Manager
4.2 Test change	Test Manager	Test Manager	Change Manager	Configuration Manager
4.3 Implement change	Operations Manager	Operations Manager	Change Manager	Configuration Manager



TOPGRADING

Great companies are made by A-Players. The secret is to hire, promote and retain only these individuals, but this is easier said than done. Research shows that typically only one-fourth of those hired or promoted turn out to be A-Players. The other three-fourths (the B- and C-Players) become miss-hires and miss-promotions. With the cost of a staffing mistake estimated at 15 times base salary, the financial drain on the average company is huge.

Compare that with the 90 percent and higher success rate enjoyed by companies that use Topgrading practices for hiring, training and promoting. Case studies of topgraded companies — including General Electric, Hillenbrand and the American Heart Association — prove that it's possible to vastly improve how people are hired and promoted at companies large or small. By rewarding A-Players, improving B-Players and weeding out C-Players, topgraded companies are much more successful. Great leaders like Jack Welch and Larry Bossidy know firsthand that Topgrading can enable your company to gain a sizeable advantage over your competition.

This summary shows how premier companies topgrade and presents compelling statistics showing why they have embraced topgrading. The basics of how to use the most important technique in Topgrading — the Topgrading Interview — and advice on legal considerations are given. This summary is for A-Players and all those aspiring to be A-Players.

Topgrading: Every Manager's First Priority

How dramatically can Topgrading improve talent? The average company today hires only 25 percent A-Players, promotes only 25 percent A-Players and has 25 to 40 percent A-Players in management. Topgraded companies hire 90 percent A-Players, promote 90 percent A-Players and eventually have 90 percent A-Players in management.

What Is Topgrading?

Topgrading is filling every position in the organization with an A-Player, at the appropriate compensation level. Topgrading involves replacing underperformers until the entire team of 10 consists of 10 A-Players, or at least those who clearly exhibit A-potential. When you are Topgrading, you are not accepting a mixture of A-, B- and C-Players. You are proactively doing whatever it takes to pack your team with *all* A-Players. Topgraders are not cheap. Circumstances might justify paying above the *entire* accepted salary range. The topgrader is more rigorous than the “upgrader,” more thorough in assessment and more likely to get what he or she pays for. Proactively seeking out and employing the most talented people can have a major effect on the creation of other competitive advantages. High performers contribute more, innovate more, work smarter, earn more trust, display more resourcefulness, take more initiative, develop better business strategies, articulate their vision more passionately, implement change more effectively, deliver higher-quality work, demonstrate greater teamwork and find ways to get the job done in less time with less cost. It’s no coincidence that A-Player managers attract and retain A-Players, who want to be part of organizations that succeed.

Who Is Topgrading?

McKinsey and Co., a premier global consultancy, is known for its commitment to seeking out and employing the best people available at every level. Intel, Dell, Goldman Sachs and 3M attract and retain A-Players and quickly redeploy C-Players. Lincoln Financial, Hillenbrand Industries, General Electric, MarineMax, Hayes Lemmerz, the American Heart Association and UBS increase their percentage of A-Players yearly and redeploy not just C-Players but B-Players too.

What Is an A-Player?

An A-Player is someone who qualifies among the top 10 percent of those available for a position. An A-Player is the best of class. Most fine companies use these definitions:

- **A-Player:** top 10 percent of talent available
- **B-Player:** next 25 percent
- **C-Player:** below the top 35 percent.

The Topgrading Calculator

The Topgrading Calculator helps to overcome talent self-delusion. If you are a perfect topgrader, you don't need a Topgrading Calculator to estimate the number of replacements necessary to achieve 100 percent A-Players. If your success rate is 100 percent, you need only hire one person (who will be an A) as a replacement. If your likely success rate is 25 percent, you need to hire four people to get a —three miss-hires and your good hire. Topgrading promises to improve your success rate from 25 to 90 percent. In the meantime, to learn how many people you will have to hire to finally have 90 percent A-Players:

1. Estimate your current number of A-Players, including those with A-potential.
2. Estimate your hiring success rate (your percentage of A-Players and A-potentials after hiring and promoting people).
3. Use the Topgrading Calculator (see above). It will show the total number of people you must hire or promote in order to end up with *at least* 90 percent A-Players, after replacing all those who turn out not to be A-Players. For example, if you wish to replace 10 underperformers, you hire or promote 10 using Topgrading, and end up with nine or more A-Players on your team.

Topgrading Calculator

Total Number of Replacements to Achieve 90 Percent A-Players

Number of Underperformers to be replaced	Your Current Success in Hiring/Promoting			
	25per cent	50per cent	75per cent	100per cent
10	31	17	11	10
20	67	35	24	20
40	141	72	48	40
100	357	179	120	100

The Financial and Career Costs of Not Topgrading

Integrating Topgrading into your interview process minimizes the firings and measurable costs of miss-hires, making your course of action relatively quick,

seamless and inexpensive. Topgrading case studies for years have shown how to achieve a 90 percent success rate in hiring. The CEOs of the following organizations estimated the percentage of upper management hires that turned out to be A-Players as follows: Lincoln Financial, 90 percent; Hayes Lemmerz, 94 percent; ghSMART, 92 percent; MarineMax, 94 percent; and the American Heart Association, 95 percent. Prior to Topgrading, most of these organizations experienced a hiring success rate of about 35 percent; Topgrading Interviews took them to 90 percent and higher. Their typical Topgrading discipline is for a group of managers to scrutinize each hire one year after the person was hired. B-Players without A potential are deemed miss-hired. In some companies that evaluation of the hire is so tough that if the hire turns out to be a B or C without A potential, the bonuses of the hiring manager and HR professionals are reduced. So there is great confidence that those deemed A-Players truly are.

The Cost of Mistakes

It doesn't make any difference if a person is "hired" from outside or inside the company. Mispromoting internally is about as costly as miss-hiring an external candidate. At the worker level there are plenty of published statistics on turnover and even a few studies of the costs associated with miss-hires. A computer search of more than 200 studies and articles produced a hodgepodge of single-company results, with costs of miss-hiring factory workers to be \$1,500 in one company and salespeople \$6,000 in another. Government studies have placed the costs of miss-hiring programmers at two to three times their annual compensation.

At the managerial and professional levels, the data are even sparser. The single biggest *estimated* cost of miss-hiring is the wasted or missed business opportunity. In recent years there have been many multimillion-dollar fiascos that clearly could have been avoided had an A-Player been hired instead of a B/C-Player. One of the most insidious elements of wasted or missed business opportunity goes to the heart of Topgrading. B/C Players hire B/C-Players and drive away A-Players. CEO miss-hires are the most serious. The media, if not behavioral scientists, cite at least some of the costs. Have you read enough about Ken Lay and Dennis Kozlowski? Their companies suffered because of their failures as CEOs. Michael Ovitz was hired and

fired by his buddy Michael Eisner at Disney, and Ovitz walked away with \$140 million in severance (challenged in later lawsuits). Not only are the stockholders hurt, but all business suffers a black eye when executives reap great financial rewards despite destroying companies and jobs.

The Career Setbacks

There is no clearer truth to a Topgrading professional than this: **The most powerful lever for career success in management is Topgrading.**

Its corollary is: There is no more certain career derailed in management than failing to topgrade.

More than 6,000 senior managers have answered exhaustive Topgrading questions about every job they held, an average of 10 jobs. Successful careers all have a common pattern: Creating more talented team's accounts for better results, earning managers more promotions. Sometimes the managers admitted they were lucky — they inherited an A-Team because a boss assigned them the “best and brightest,” or they went to work for a Topgrading company that taught them how to do it. Most were motivated and resourceful, figuring out how to develop or replace non-A-Players. The vast majority of managers interviewed in a recent study experienced a stutter step—a failure to topgrade and a resulting failure to perform—that led to career stagnation for a while or, in some cases, getting fired. The most successful leaders figure out the importance of Topgrading, do it, get better results and earn promotions.

Hiring and Promoting Talent: The Topgrading Platinum Standard

The main responsibility for hiring good people rests on your — the manager's or CEO's — shoulders. The CEO's job is to achieve results by getting the strategy, talent and organizational culture right. Topgrading must be thought of as a function permeating the entire company, supported by HR but driven by the CEO. When delegated to HR, Topgrading fails, even when HR is a fully topgraded function. HR cannot drive Topgrading, because it lacks the line authority and political clout and because many HR systems (compensation, performance management, hiring, succession planning) require CEO intervention to maintain the A-Player standard.

Anyone can topgrade — *any* department managers can topgrade a department; *any* division managers can topgrade a division. But from a corporate Topgrading perspective, the CEO cannot assume that A-Player subordinates are doing it. That's why Jeffrey Immelt (CEO) and Bill Conaty (HR) literally spend months in the famous Session C talent meetings at GE. The same principle holds for you if you are a function head or operating division head. As a division president you can topgrade, but it is foolish to assume that all your A-Player plant managers will topgrade (even though they would not be considered A-Players without being topgraders). In your talent meetings as well as daily discussions, you must be sure that no one is gaming the system or eroding your A-Player standard for political reasons.

Topgrading Assessments

In Topgrading companies it is typical for everyone in management to be Topgrading-assessed, to create an overall talent picture of A's, A-potentials and non-A's. Managers are developed and become A's or are redeployed, and eventually there are 90 percent A-Players. Companies relying on a current performance review and a three-year-old Topgrading assessment fail to achieve 90 percent success in promotions. To achieve a 90 percent success in promotions, you must supplement performance appraisals with a fresh, current Topgrading based assessment.

Redeploying Chronic B- and C-Players: A Moral Approach

If Topgrading means packing teams, even the entire company, with A-Players, then it usually involves removing chronic B- and C-Players. *Chronic* means they don't even try to become A-Players or else they have embraced their Individual Development Plan, or IDP, (a performance plan to maximize strengths and minimize weak points) but simply aren't improving sufficiently to qualify as A-Players in a reasonable amount of time. Some B/C-Players can be redeployed internally into jobs where they can be A-Players. If this isn't feasible, they are redeployed externally. They're let go or "changed out," though typically with an appropriate severance and outplacement counseling. Having worked on their IDPs, they also have good insights into themselves and a clear understanding of what sort of job would enable them to be happy and ...A-Players! Unfortunately, Topgrading requires some firing or asking people to resign. It's painful, but it's not immoral if companies:

- Use the best selection techniques, which lead to hiring 90 percent A-Players;
- Use the best assessment techniques, which identify as many people with a potential as possible;
- Use the best coaching techniques, which give potentials the best chance of becoming A-Players;
- Look for other internal jobs where the person would be an A-Player; and
- Fire people only if they fail to achieve agreed-upon standards for performance.

Topgrading Case Study: Lincoln Financial

In 1998 Jon Boscia was named chairman and CEO of Lincoln Financial, and he continued to execute the new business strategy, transforming Lincoln from a traditional life insurance company to a diversified financial services powerhouse. Topgrading was key to the success. Today Lincoln, with \$5.3 billion in revenues and \$131 billion in assets, is a different company, one of the nation's leading providers of wealth accumulation and protection, financial planning and investment advisory services for the fast-growing segments of affluent and retirement markets. Topgrading required dramatic changes in management, not because the company had weak talent, but because some of the managers in the traditional insurance company lacked necessary competencies to drive the strategy. Boscia said, "About half of the top 100 managers were A-Players in the old Lincoln and became A's in the new Lincoln, but others simply did not have the necessary skills for the new strategy."

Simple Topgrading Model

To qualify as a company that topgrades, the A-Player standard has to be embraced, but that alone is insufficient. The A-Player standard is not achieved without superb methods to assess and deploy internal talent and assess candidates for selection. The simplest model for Topgrading includes these five essential components:

1. Topgrade from the top down;
2. Assess internal talent using Topgrading Interviews, a process that involves an in depth review of an individual's education and work history, his or her core competencies, as well as a thorough background check;
3. Coach people using Topgrading-based Individual Development Plans;

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4. Hire and promote people using Topgrading Interviews; and
5. Redeploy (fire, demote, transfer) people who fail to achieve the A-Player standard.

Obstacles to Topgrading and How A-Players Overcome Them

Ratcheting up an organization's talent involves many obstacles. Here are the top 10 major obstacles to Topgrading and the best practices to overcome them:

1. "I can't get my B/C-Players to hire A-Players."

Topgrade from the top down, or require your A-Players to make the Topgrading judgments for their B/C's.

2. "We think we're hiring A-Players, but they turn out to be B/C-Players in disguise."

Perform more accurate assessments using the Topgrading Interview.

3. "Our human resources people are overworked and understaffed, so we don't exactly have a pipeline of A-Players going through the office."

Constantly recruit your "virtual bench," your network of A-Players in your Rolodex, who are ever available to join you. And require all your managers to constantly build their virtual bench.

4. "Search firms just don't produce enough A Player candidates."

Manage the search process, including search firms, much more thoroughly.

5. "I want to raise the performance bar, but almost every talented person I bring in from the outside is rejected by the current organization culture and ends up quitting."

Provide new A-Players protection from undermining by existing personnel.

6. "We can't afford to hire A-Players."

A-Players are available at *all* compensation levels.

7. "I do not want to fire loyal B/C-Players."

Redeploy chronic B/C-Players because painful as it is to fire someone, failing to do so is almost always more painful—to the company, your career and the underperformer.

8. **“Our problems will soon clear up because we engaged a management consulting firm and their report looks great, so Topgrading isn’t necessary.”**

Topgrade first. Organizations that topgrade are able to drive improvements in strategy, productivity, innovation, quality, customer service and speed to market.

9. **“We could never attract A-Players because of our location, industry, current financial problems and so on.”**

Pay more in compensation to attract the level of talent necessary to beat the competition.

10. **“My subordinates tend to give ‘thumbs-down’ on A-Players.”**

Don’t let them have a vote. Make the hiring decision yourself.

The Topgrading Interview Guide

The Topgrading Interview Guide provides you with the most accurate and valid insights when assessing internal talent and candidates for selection or promotion. Companies can achieve a record of 90 percent A Players hired when a tandem interview (two interviewers) is conducted and the interviewers have been trained in Topgrading Interview techniques. The Topgrading Interview Guide features comprehensive questions that cover college, work history, self-appraisal of strengths and weaknesses, leadership/management, Topgrading and competencies. It produces more valid results than so-called targeted, or competency-based, interviews that ignore dozens of important competencies as well as the chronology, the crucial patterns of how the interviewee developed throughout his or her career.

Interview Questions to Facilitate Topgrading

During the interview process, it's important to ask thorough questions about the interviewee's education and prior work history. Beginning with college, incorporate some of the following questions into your Topgrading Interview:

- What people or events during college might have had an influence on your career?
- What were the high points during your college years? (Look for leadership, resourcefulness and particularly what competencies the interviewee exhibits *now* while discussing those years.); and
- What were your career thoughts toward the end of college?

Following the questions about education, move into a discussion about the interviewee's work history. Based on his or her resume, you will already have an overview, but the following questions will allow you to delve deeper:

- What were *your* expectations for the job? What did you find when you arrived to the position? What major challenges did you face?
- What results were achieved in terms of successes and accomplishments? How were they achieved?
- As a manager, what sort of talent did you inherit? What changes did you make, how did you make them and how many A-, B- and C-Players did you end up with?

It is also necessary to have the interviewee give a self appraisal. This involves listing all of his or her strengths and assets, as well as any shortcomings and areas for improvement. After obtaining the list, go back through and have the interviewee elaborate upon each point. Finally, ask the interviewee to go over his or her competencies with you. These include intellectual, personal, interpersonal, management, leadership and motivational competencies. A general question such as "Please describe _____ and what specific examples can you cite?" should be asked. This information will allow you to assess a number of the interviewee's competencies.

Interpreting All the Data

Here are some of the most important principles for valid interpretation of data:

- 1. Observe patterns.** Patterns in many statements give multiple vantage points from which to find out what makes a person tick and what the person's strengths and weak points are.
- 2. Assume that strengths can become shortcomings.**
Under pressure, we all tend to overuse our strengths, and they can become shortcomings. During interviews, entertain this hypothesis frequently.
- 3. Assume recent past behavior is the best predictor of near-future behavior.**
As you review an individual's chronological history, weigh the most recent behaviors most heavily.
- 4. Spot red flags and look for explanations.**
Red flags are warning signals to the interviewer that something has gone wrong. Use follow-up questions to get additional information.
- 5. Weigh negatives more heavily than positives.**
Good-fit factors do not ensure success, but poor-fit factors can ensure failure.
- 6. Watch out for strong feelings and beliefs.** Naturally, strong beliefs can be an asset for any candidate. It's when the beliefs are accompanied by rigidity, intolerance and extreme emotionality that you begin to wonder if there might be accompanying shortcomings.

Coaching 101: The Topgrading-Based Model

Coaching is a one-to-one dialogue in which a coach helps a person understand his or her strengths and weak points and build commitment to improve performance.

Coaching helps unlock someone's potential. This involves:

- **Counseling** — to help someone improve self-awareness and change points of view;
- **Mentoring** — sharing sage advice to help someone become savvier in matters of organizational culture, networking and career planning;
- **Teaching** — instructing someone in order to improve expertise; and
- **Confronting** — addressing non-performance to help someone either achieve performance goals or accept the necessity of redeployment. Ordinary solid

human qualities blended with Topgrading best practices frequently result in leaders being rated “very high” on coaching scales. This becomes clear during assimilation coaching, a disciplined process to help your new hire adjust and to begin a comprehensive developmental process.

Assimilation Coaching

First-time Topgrading interviewers have fun in assimilation coaching, a high-powered, positive coaching session. You feel empowered, so it is relatively easy to empower your new hire. There are fewer problems to fix with A-Players than with C-Players, so there is little inclination to push, cajole or demand certain changes. With an initial coaching meeting a success, you become positively reinforced to polish your skills, to extend coaching to other subordinates. Hiring an A-Player using Topgrading interviewing and thorough reference checking automatically endows you with super coach characteristics.

A Topgrading-based coaching meeting, whether for assimilation or another purpose, is not always warm and fuzzy. Even A-Players have weak points — plenty of them. Coaching need not be acrimonious, but to be effective, it must be hard-hitting. The nicest thing you can do for high-potential managers is tell the truth and hold them accountable for growth. That means saying, “Improve, and only then will you get promoted.” People change the most when they sense pain in not changing and benefits in changing, and fully embrace developmental activities to achieve their goals.

Coaching to Fix Weaknesses

Having conducted a Topgrading Interview gives you instant coaching advantages. Having hired an A-Player, you automatically are 20 percent better as a coach. The four essential steps in coaching a new hire to succeed are:

- 1. Hire an A-Player with** a tandem Topgrading Interview, reference checks with all bosses in past 10 years, a co-worker competency interview (one hour each), and conclusions stated in a Candidate Assessment Scorecard (CAS), a simple form used to assess the candidate on all competencies;

2. **Conduct oral interviews or e-mail 360 survey** two to four weeks after hire, with the purpose of measuring first impressions;
3. **Have a coaching interview** two to six weeks after hire; state conclusions, strengths, weak points; and create an Individual Development Plan together; and
4. **Hold a mid-year career review** in which you discuss follow-up e-mail 360 survey results and include feedback to you.

This rather typical assimilation-coaching session should progress through the seven psychological stages of change: awareness, rational acceptance, emotional commitment, program for development, reinforcement, monitoring progress and conclusion.

Constructive Criticism

The business world is too fast-paced and too demanding for quiet, gentle little hints, except with a rare subordinate requiring you're most flexible and sensitive care. This world requires hard-hitting constructive criticism. You want the straight scoop if your boss is dissatisfied. You want to be treated with respect, and you respond best when you are presented positively with an opportunity to improve. Your subordinates want and deserve the same thing.

Avoiding Legal Problems

Topgrading can embrace the spirit and letter of employment law or it can be abused. An effort to remove chronic B- and C-Players can incur big risks if care is not taken to avoid a charge of discrimination — age discrimination, for example. Developing future A-Players can trigger litigation if disabled people protected by the Americans with Disabilities Act are overlooked. The Equal Employment

Opportunity Commission will be knocking on your door if your infusion of new A-Players systematically excludes minorities. Employees and managers have discovered not only their civil rights, but also their contract and tort rights. Unless your company protects itself, it could face serious employment-related claims,

including claims of wrongful discharge, breach of contract, discrimination, negligent hiring or harassment.

Topgrading will help you meet legal requirements during the hiring process. The leading-edge practices in recruitment and selection — job analyses, behaviorally anchored competencies, structured interviews, note taking and so forth — must be coupled with working hand in hand with your partner in HR and your legal counsel to avoid legal problems. State laws vary and your company might be vulnerable. Check with your attorney before acting or failing to act.

Safe Hiring and Firing Practices

Despite the complexities of employment law, the answer is to focus on the fundamentals: (1) perform thorough job analysis; (2) write job descriptions with behavioral competencies; (3) use nondiscriminatory language in employment applications, Topgrading forms and guides, job advertisements and interviews; (4) use legally sound job offer letters; (5) avoid negligent hiring and retention claims; (6) use safe managing and firing practices; and (7) follow guidelines on how to topgrade outside the United States.

Topgrading in the Future

It's hard to imagine an organization that cannot benefit from Topgrading. From hot dog stands to the United Nations, A-Players get results, C-Players don't. What organization cannot benefit from a 90 percent success in hiring versus 25 percent? Consider just a few future venues for Topgrading:

1. Community Service.

Community-service organizations can attract more money in the future by Topgrading them and advertising, "We have a team of A-Players who will spend your donations for maximum results."

2. Government.

Why not screen political candidates for financial support by submitting them to Topgrading Interviews?

3. Finance.

Half of all mergers and acquisitions fail, and the biggest reason is inadequate talent. The most successful venture capitalists are very rigorous in assessing management in organizations in which they invest; they qualify as topgraders. Topgrading offers the world of finance accurate insight into people.

4. Governance.

To hire a CEO, boards have historically trusted the search firm's interviews and report, with directors performing perfunctory interviews. With directors taking more (deserved) heat and incurring more legal risk, it would seem prudent to select a CEO by Topgrading.

5. Legally Mandated Topgrading.

With race norming and quotas illegal, yet the pressure for affirmative action continuing, valid approaches for hiring truly talented protected groups is the solution.

6. Education.

Are 90 percent of teachers in your school system A-Players? European high schools surpass U.S. schools on standardized tests, yet our per-pupil cost is sky-high (six times what French students are allocated, for example).

7. Career Planning.

Topgraded companies rarely promote people over their heads or leave a super-talent languishing and underutilized. Educational institutions could assess students' career talents much better if they would incorporate a Topgrading Interview.

8. Future Research on Topgrading.

Talent as an issue, or opportunity, is as old as the human race. Many companies could contribute to the body of scientific literature, and hundreds of master's theses and Ph.D. dissertation could refine and connect individual corporate studies. In the meantime, you can conduct your own research on talent maximization every day. Topgrading is not easy. There are lessons to be learned, by you and me, about what Topgrading approaches work best. Your personal "case study" is an art form, a work in progress.



DEVELOP YOUR LEADERSHIP SKILLS?

Write down the 5 skills you consider to be essential for effective leadership?

1. _____
2. _____
3. _____
4. _____
5. _____

What you have to be: Some essential qualities

You cannot leave personality and character out of leadership. There are some qualities that you have to have. Basically you should possess, exemplify and perhaps even personify the qualities expected or required in your working group. Without it you will lack credibility.

Exercise: You may like to take some paper and make a list of the five or six qualities expected in those working in your field. Check it out with colleagues.

Notice that words may vary – ‘hard-working’ and ‘industrious’, for example – but the concepts of the traits, qualities or abilities remain the same. These qualities are necessary for you to be a leader, but they are not in themselves sufficient to make you be seen as one. For example, you cannot be a military leader without physical courage. But there are plenty of soldiers with physical courage who are not leaders – it is a military virtue.

So what other qualities do you need?

You will have noticed that these qualities are very much anchored in particular fields. There may well be some commonality, but certainly the degrees to which the qualities are required will vary considerably. There are, however, some more generic

or transferable leadership qualities that you should recognize in yourself – you will certainly see them in other leaders. They are set out in the box on the next page.

Qualities of leadership – across the board:

- **Enthusiasm.** Can you think of any leader who lacks enthusiasm? It is very hard to do so, isn't it?
- **Integrity.** This is the quality that makes people trust you. And trust is essential in all human relationships – professional or private. 'Integrity' means both personal wholeness and adherence to values outside yourself – especially goodness and truth.
- **Toughness.** Leaders are often demanding people; uncomfortable to have around because their standards are high. They are resilient and tenacious. Leaders aim to be respected, but not necessarily popular.
- **Fairness.** Effective leaders treat individuals differently but equally. They do not have favourites. They are impartial in giving rewards and penalties for performance.
- **Warmth.** Cold fish do not make good leaders. Leadership involves your heart as well as your mind. Loving what you are doing and caring for people are equally essential.
- **Humility.** This is an odd quality, but characteristic of the very best leaders. The opposite to humility is arrogance. Who wants to work for an arrogant manager? The signs of a good leader are a willingness to listen and a lack of an over-weening ego.
- **Confidence.** Confidence is essential. People will sense whether or not you have it. So developing self-confidence is always the preliminary to becoming a leader. But don't let it become overconfidence, the first station on the track leading to arrogance.

Some readers may question the inclusion of integrity in this list. Are there not good leaders, such as Adolf Hitler, who totally lacked integrity? There is a useful distinction between good leaders and leaders for good. Whether or not Hitler was a good leader is a debatable matter – in some respects he was and in others he was not – but he was certainly not a leader for good. But this is all a bit academic. For leadership that does not rest on the bedrock of integrity does not last: it always collapses, and usually sooner rather than later. Why? Because that is the way of human nature.

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You can build your self-confidence, discover new wells of enthusiasm and grow in integrity. But it all takes time. It is better to start on one of the other two paths up the mountain. Review your progress as the profile of your strengths and weaknesses (in terms of personality and character) begins to unfold and change in the positive direction. Always remain open to feedback, however painful it may be.

In testing whether or not you have the basic qualities of leadership, you should ask yourself the questions in the following checklist.

Checklist to test qualities

Question	Yes	No
Do I possess the above-mentioned seven qualities?		
Have I demonstrated that I am a responsible person?		
Do I like the responsibility and the rewards of leadership?		
Am I well known for my enthusiasm at work?		
Have I ever been described as having integrity?		
Can I show that people think of me as a warm person?		
Am I an active and socially participative person?		
Do I have the self-confidence to take criticism, indifference and/or unpopularity from others?		
Can I control my emotions and moods or do I let them control me?		

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Have I been dishonest or less than straight with people who work for me over the past six months?		
Am I very introvert or very extrovert (or am I an ambivert – mixture of both – as leaders should be)?		

Another approach to leadership plays down the idea that there are such things as generic leadership qualities. It stresses the idea that leadership depends on the situation. In some situations one person may emerge as the leader; in others he or she may not. Some qualities are situation-related, but others, such as enthusiasm, moral courage and stamina are found in leaders in widely different situations. The main contribution of this situational approach is that it emphasizes the importance of knowledge in working

Life and knowledge are linked to authority. There are four forms of authority among people:

- The authority of position and rank – ‘Do this because I am the boss!’
- The authority of knowledge – ‘Authority flows to the one who knows.’ The authority of personality – in its extreme form, charisma.
- Moral authority – personal authority to ask others to make sacrifices.

Knowledge creates confidence in others. For this reason your acquisition of technical and professional knowledge is actually part of your development as a leader. You are equipping yourself with one essential ingredient.

Case Study

Martin is an outstanding technician, and he was pleased when he was promoted to team leader. The technical director in charge of production, Sally Henderson, had her doubts about Martin's abilities as a first-line manager, but promotion to a managerial role was the only way in that company of giving more money to people like Martin with long service and technical experience. After some weeks the team's performance began to fall behind that of the others. Martin knew all the answers, but he did not listen. When things began to go wrong he became more of a bully. He reduced one team member to tears in front of the others. 'But I cannot understand it,' Henderson said to the team while Martin was away for a few days recovering from stress. 'Isn't Martin a leader?' 'He certainly knows this factory backwards,' replied one of the team. 'He is a real expert. But, no, we wouldn't use the word "leader" for him. He is no leader. There is more to leadership than technical knowledge.'

All the main strands of authority – position, knowledge and personality – are important. In order to get free and equal people to cooperate and produce great results, you need to rely upon the second and third forms of authority as well as the first. It is like a three-stranded rope. Don't entrust all your weight to one strand only. In the first phase of your career as a leader you will probably be working in a fairly well-defined field of work, and you will have acquired the necessary professional and technical knowledge. But, within your field, situations are changing all the time. How flexible are you? Can you cope, for example, with both growth and retraction? The following checklist will help you to confirm both that you are in the right field and also that you are developing the flexibility to stay in charge in a variety of different situations – including some that cannot be foreseen.

Checklist: are you right for the situation?

Question	Yes	No
Do you feel that your interests, aptitudes (e.g. mechanical, verbal) and temperament are suited to the field you are in?		
Can you identify a field where you would be more likely to emerge as a leader?		
How have you developed 'the authority of knowledge'? E.g. Have you done all you can at this stage in your career to acquire the		

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necessary professional or specialist training available?		
Have you experience in more than one field or more than one industry or more than one function?		

Do you take an interest in fields adjacent, and potentially relevant, to your own?		
Sometimes		
Never		
Always		
How flexible are you within your field? Are you:		
Good – you have responded to situational changes with marked flexibility of approach; you read situations well, think about them and respond with the appropriate kind of leadership.		
Adequate – you have proved yourself in some situations, but you fear others; you are happiest only when the situation is normal and predictable.		
Weak – you are highly adapted to one particular work environment and cannot stand change; you are often called rigid or inflexible.		

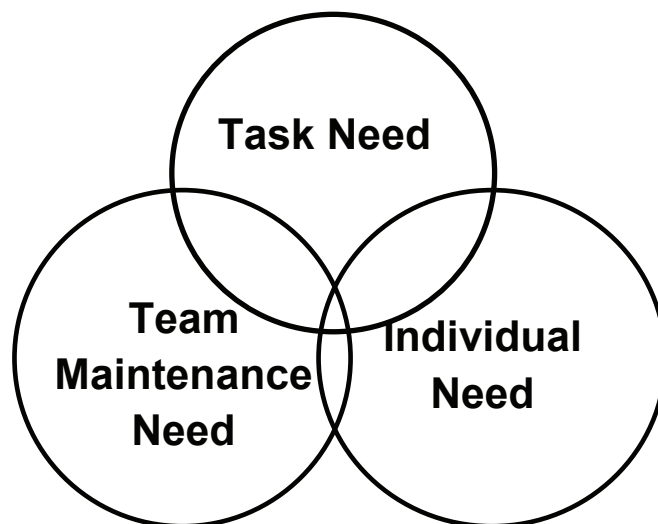
A third line of thinking about leadership focuses on the group. This group approach, leads us to see leadership in terms of functions that meet group needs: what has to be done.

In fact, if you look closely at matters involving leadership, there are always three elements or variables:

- the leader – qualities of personality and character;
- the situation – partly constant, partly varying; and
- The group – the followers: their needs and values.

Work groups are always different, just as individuals are. After coming together they soon develop a group personality, so that who works in one group may not work in another. All groups and organizations are unique. But that is only half of the truth. The other half is that work groups – like individuals – have certain needs in common. There are three areas of overlapping needs that are centrally important, as illustrated in the figure below.

Figure 1 Overlapping needs



Task need:

Work groups and organizations come into being because there is a task to be done that is too big for one person. You can climb a hill or small mountain by yourself, but you cannot climb Mount Everest on your own – you need a team for that. Why call it a need? Because pressure builds up a head of steam to accomplish the common task. People can feel very frustrated if they are prevented from doing so.

Team maintenance need:

This is not so easy to perceive as the task need; as with an iceberg, much of the life of any group lies below the surface. The distinction that the task needs concerns things and the team maintenance need involves people does not help much. Again, it is best to think of groups that are threatened from without by forces aimed at their disintegration or from within by disruptive people or ideas. We can then see how they give priority to maintaining themselves against these external or internal pressures, sometimes showing great ingenuity in the process. Many of the written or unwritten rules of the group are designed to promote this unity and to maintain cohesiveness at all costs. Those who rock the boat or infringe group standards and corporate balance may expect reactions varying from friendly indulgence to downright anger. Instinctively a common feeling exists that 'United we stand, divided we fall', that good relationships, desirable in themselves, are also an essential means towards the shared end. This need to create and promote group cohesiveness is called the team maintenance need

Individual needs:

Thirdly, individuals bring into the group their own needs – not just the physical ones for food and shelter (which are largely catered for by the payment of wages these days) but also the psychological ones: recognition; a sense of doing something worthwhile; status; and the deeper needs to give to and receive from other people in a working situation. These individual needs are perhaps more profound than we sometimes realize. They spring from the depths of our common life as human beings. They may attract us to, or repel us from, any given group. Underlying them all is the fact that people need one another not just to survive but to achieve and develop personality. This growth occurs in a whole range of social activities –

friendship, marriage and neighborhood – but inevitably work groups are extremely important because so many people spend so much of their waking time in them.

The three circles interact:

Now these three areas of need overlap and influence one another. If the common task is achieved, for example, then that tends to build the team and to satisfy personal human needs in individuals. If there is a lack of cohesiveness in the team circle – a failure of team maintenance – then clearly performance in the task area will be impaired and the satisfaction of individual members reduced. Thus we can visualize the needs present in work groups as three overlapping circles, as shown in Figure 1.

In whatever field you are in, at whatever level of leadership – team leader, operational leader or strategic leader – there are three things that you should always be thinking about: task, team and individual. Leadership is essentially another centered activity not a self-centered one. The three-circle model is simple but not simplistic or superficial. Of course they are not always as balanced and clear as the model suggests, but they are nonetheless there.

What has all this got to do with leadership?

Simply this: in order to achieve the common task and to maintain teamwork, certain functions have to be performed. And a function is what you do, as opposed to a quality, which is an aspect of what you are. For example, someone has to define the objectives, make a plan, or hold the team together if it is threatened by disruptive forces.

Now we are on firm ground. You can learn to provide the functions of leadership that are called for by task, team and individual needs. This is the entrance door to effective leadership. Moreover, you can – by practice, study, experience and reflection – learn to do the functions with skill: they will become your leadership skills. That does not mean that you will be performing all of them all of the time. But

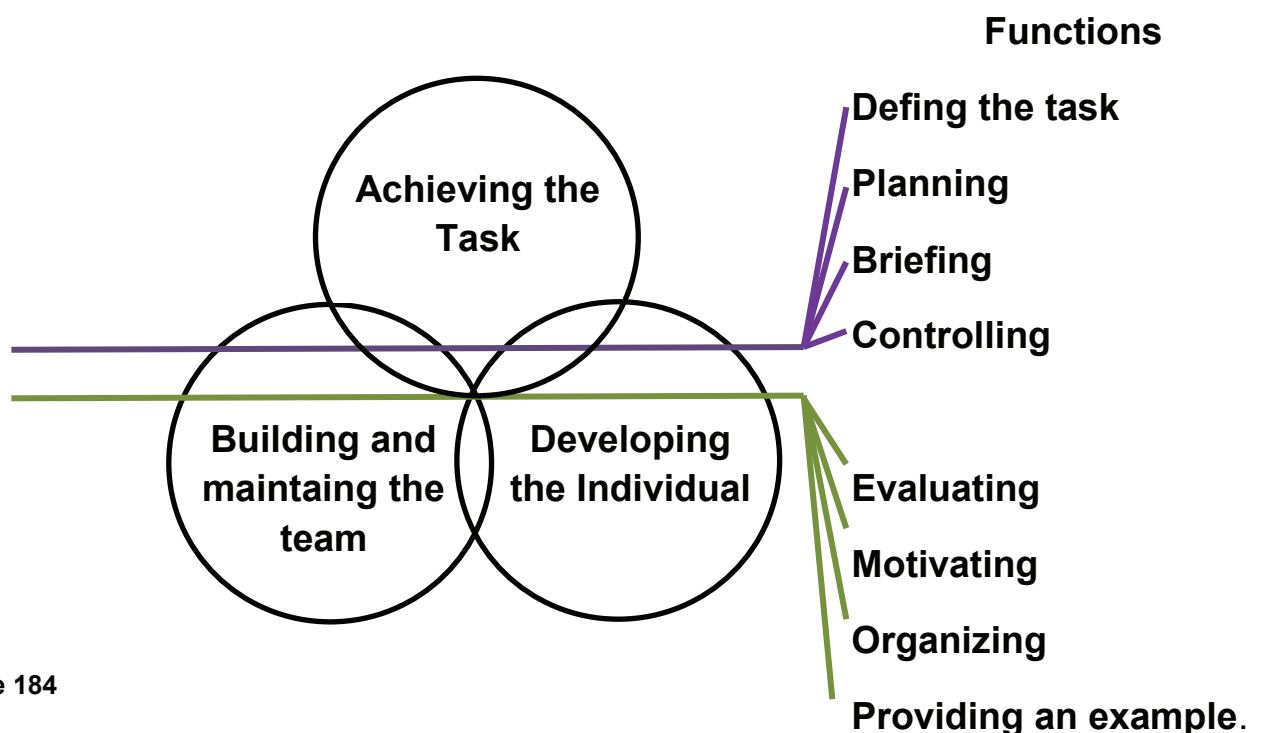
they will be like sharp, bright and well-oiled tools in your tool box, ready for instant use when need calls.

You can now be crystal clear about your role as a leader. A metaphor drawn from the theatre, it points to the part assigned or assumed in the drama. In its wider social use, a role can be roughly defined as the expectations that people have of you. Of course, if different people have different expectations, you may experience role conflict. You may find, for example, that there is considerable tension at certain times in your life between the expectations of your parents, those of your life partner and those of your children.

We do not expect people to act outside their roles in the context of work. For instance, if a police officer stopped your car simply to tell you a joke that had been heard on television the previous night, most of us would not be amused. We do not expect police officers to behave in that way.

This is where the three-circle model comes in: what it does for you is to define the leader's role in a visual way. People expect their leaders to help them to achieve the common task, to build the synergy of teamwork and to respond to individuals and meet their needs. The overlapping circles integrate these three facets of the role.

Figure 2 Leadership Functions



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Here is your challenge as a leader or leader-to-be. Competence is within your grasp, but reach out for skill, and never rest content until you have achieved excellence in leadership.

Whether in team, operational or organizational leadership, what matters is:

- the leader – qualities of personality and character;
- the situation – partly constant, partly varying; and
- The team – the followers: their needs and values.

Remember always that – because the three areas of task, team and individual overlap so much – any function will tend to affect all three circles. Take planning, for example, at first sight that appears to be solely a task function. Yet there is nothing like a bad plan to break up a team or frustrate an individual: it hits all three circles.

Another general factor to bear in mind is that leadership exists on different levels:

- team leadership: you are leading a team of about five to 20 people;
- operational leadership: you are leading a significant unit in the business or organization, composed of a number of teams whose leaders report to you; and
- Strategic leadership: you are leading a whole business or organization, with overall accountability for the two levels of leadership below you.

Not only the three circles but the eight functions also apply at all these levels, although in different ways.

The functional approach to leadership set out here is also sometimes called action-centered leadership. A function is one of a group of related actions contributing to development or maintenance, just as each part of the body has its function in relation to the whole. 'Function' comes from a Latin word meaning performance. Sometimes it is used more widely to mean what I have called role – the special kind of activity proper to a professional position. Are you functional as a leader? In other words, are you capable of performing the regular functions expected of a leader?

'Task' is a very general word. It simply means 'something that needs to be done', usually something that you are required to do. Generally speaking, people in teams or organizations have some idea of what they are there to do, but that general sense needs to be focused on to an objective that is:

- clear;
- concrete;
- time-limited;
- realistic;
- challenging;and
- Capable of evaluation.

The last point refers to a simple 'success criterion' that will enable you – and the team – to know that the objective has been achieved. If your target or goal is to reach the top of Mount Everest, for example, you will know when you attain it. In many other areas of human endeavour, of course, the success criteria are far less obvious.

Leadership is also about answering the question why as well as what. A boss may tell you what to do in a specific way, but a leader will explain or convey to you why as a first and important step on the road to your free and willing cooperation – the hallmark of all true leadership. There is an overlap here with motivation, or giving others a sufficient reason or grounds for action, which we shall discuss shortly. Here we stay within the task circle and suggest that all leaders should be able to relate an objective to the wider aims and purpose of the organization. In other words, they need to be able to think –and often to speak – in terms of a set of directions. When they do so they will be moving from the particular to the more general, from the concrete to the more abstract.

Change is perhaps the most important factor that calls for leadership as opposed to mere management.

Checklist: Defining the Task

Question	Yes	No
Are you clear about the objectives of your group now and for the next few years/months, and have you agreed them with your boss?		
Do you fully understand the wider aims and purpose of the organization?		
Can you relate the objectives of your group to those larger, more general intentions?		
Does your present main objective have sufficient specificity? Is it defined in terms of time? Is it as concrete or tangible as you can make it?		
Will the group be able to know soon for themselves if you succeed or fail? Does it have swift feedback of results?		

Leaders at all levels should stimulate and focus a sense of direction. ‘Vision’ literally means to see where you are going. Allied with some creative thinking, it can provide a new direction for a group or an organization. Change always brings the necessity to think very hard about your purpose, as well as your aims and objectives, in the context of the rapid changes in markets, technology, and economic and social life. That kind of thinking is the prime responsibility of strategic leaders, but if they are wise they will involve their operational and team leaders in this process as well. You need to understand the why behind the objectives you are being asked to achieve (see ‘Checklist: defining the task’).

Planning means building a mental bridge from where you are now to where you want to be when you have achieved the objective before you. The function of planning meets the group’s need to accomplish its task by answering the question how. But

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the 'how' question soon leads to 'When does this or that have to happen?' and 'Who does what?'

From the leadership perspective, the key issue is how far you should make the plan yourself or how far you should share the planning function with your team.

Checklist: To Test Plans

Question	Yes	No
Have I called upon specialist advice?		
Have all feasible courses of action been considered and weighed up in terms of resources needed/available and outcomes?		
Has a programme been established that will achieve the objective?		
Is there a provision for contingencies?		
Were more creative solutions searched for as a basis for the plan?		
Is the plan simple and as foolproof as possible, rather than complicated?		
Does the plan include necessary preparation or training of the team and its members?		

Briefing is the function of communicating objectives and plans to the team. It usually involves standing or sitting in front of the team and briefing them in a face-to-face way. Like all functions, briefing can be done with skill, for there is a right way to brief a group and a wrong way. Briefing, in fact, is part of a much larger communication skill: effective speaking. Here are some guidelines:

- Be prepared. Rehearse and practice. Make sure that you have some professional-looking visual aids: 'A picture is worth a thousand words.'= Be clear. Double-check that what you are saying is not vague, ambiguous or muddled – leave talk like that to the politicians!
- Be simple. Reduce complicated matter to its simplest form without oversimplifying. Avoid technical language or jargon that your audience will not understand;
- Be vivid. Color your message with enthusiasm, confidence and humor. Make it live – make it exciting and challenging and fun; and
- Be natural. You do not need to be a great orator. Just be yourself – your best self.

Briefing is not something that you do only at the outset of a project and then forget about. Most probably, especially if the team is new or inexperienced, you will have to repeat the objective and plan as work progresses. It is always a function waiting to be performed.

Communication is the sister of leadership. Briefing points to only one skill, namely public speaking. Remember that listening is co-equal in importance. Everyone has something to contribute to the plan and its execution: ideas, suggestions or information. You need to be a listening leader.

Briefing sessions or conferences – work meetings – allow you to do some valuable work in all three circles, making general points connected with the specific matter in hand. In the task area, for example, you can make it the occasion for taking charge by giving direction and focus. A certain amount of assertiveness is often required of leaders, and the group will accept it – even welcome it – if the situation calls for it. You can stress the team approach to the task in hand, thus building up team spirit.

You can meet individual needs by listening to and acknowledging the help of those who help you to achieve the ends of the meeting. It can also be an opportunity for emphasizing the significance of each individual's contribution to the success of the enterprise.

Some of the supreme examples of leadership occur when a leader takes over a demoralized group and 'turns it around'. The initial briefing meeting can be especially important in this process, for first impressions are as basic in working relationships as in love and friendship. The impression that you make on people at that first meeting will stay with them forever. The task may have to be covered in general terms if you are new to the job – you can do little more than share your first thoughts. But you can share your vision, your spirit of resolve, and your determination to change the climate and standards of the group. That may require some tough talking, and people will wait to see if it is going to be backed up by equally firm deeds.

Controlling is the function of ensuring that all the energy of the team, and the resources at its disposal, are turning wheels and making things happen. Sometimes teams are like inefficient old steam engines, with much of their energies escaping like hissing steam into space and doing nothing to move the iron monster forward.

Of course humans are not machines, and some of their energy during the day will go into discussions or activities unrelated to the common task. Within reason, this 'time wasting' is acceptable, but it can become a problem in a team that does not have a really positive attitude to the common task.

Case Study

Angela Roberts was appointed at a particularly difficult time as a team leader in a factory assembling television sets. Sales were falling, complaints about quality abounded, and morale was especially low. She noticed one symptom of this poor morale on her very first day in charge. The team members in the electronics factory where she had worked before usually took a 15-minute coffee break in the mornings, but here she found that 45 minutes was nearer the norm. 'You have a controlling problem,' she told herself, and, being a good leader, by example and word she soon set a new standard.

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It is the natural instinct of leaders (perhaps in contrast to managers) to rely as much as possible on self-control or self-discipline in others. The better the team and its constituent individual members, the more you can do that. The point about self-discipline is that it is our only way of being both disciplined or controlled and free. If control or discipline is imposed upon us – as sometimes it must be – we always lose an element of freedom. Now leadership only really exists among free and equal people, and so ultimately a large element of self-control is a necessary element of leadership. If a group or team, organization or community lack that, then they are also inadvertently robbing themselves of the opportunity to experience leadership as opposed to management.

‘Control’ comes from Medieval Latin *contrarotulare* and originally meant ‘to check accounts’. Its financial origin is a reminder that finance in different ways – profit targets and spending limits – is one important means of control. Self-managing teams (which are not the same as leaderless groups!) are those who take on board budget responsibility for planning and controlling their own work. Within limits they have discretion on how to use the resources – especially the money – that have been entrusted to them for achieving their agreed objectives.

Success at directing, regulating, restraining or encouraging individual and team efforts on the task (and in meetings) is the criterion for testing a leader’s effectiveness as a ‘controller’.

Checklist: testing controlling skills

Question	Yes	No
Do I maintain a balance between controlling too tightly and giving too much freedom to the team?		
Am I able to coordinate work-in-progress, bringing together all the parts in proper relation to each other?		
In technical work, do I ensure that team and individual needs are met?		
Do meetings I chair run over time(s) allotted to topics?		

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Do I have proper budgets and ways of monitoring actual performance?		
Do customers rate my organization's control systems for:		
quality of product/service		
delivery		
costs		
Safety?		

One essential strand in the concept of management, and one that is often overlooked in leadership, is relevant here. Management implies the efficient use of resources as well as their effective use. In these days of scarce resources – people's time, money and material in all its forms – the thrifty or economical use of resources is an imperative for all those who occupy organizational or community leadership roles. Good leaders will be managers in the sense that they husband care- fully and spend to good effect the resources at their disposal. They get the maximum results with the minimum use of resources.

As we have already seen, a key part of defining the task is establishing the success criteria – by which we shall know whether we are achieving the objective or at least making progress in its general direction. Evaluating, however, is much wider than that. It is that part of practical thinking that has to do with values.

Success has to do with values, ultimately with the values of the organization or the individual concerned. Performance has to be judged in relation to those values, which are usually implicit in the organization's purpose. It meets the task need circle, because people need to know where they are in relation to the end result they are aiming at.

Consequently, evaluating or review is not something that you, as a leader, leave to the 'wash-up' at the end. Whenever you comment on progress – or the lack of it – or invite the team to consider their own agreed success criteria, you are performing the function of evaluating.

Because it is a major mental function, an integral part of thinking (see my Decision Making and Problem Solving in the Creating Success series), valuing or evaluating will play a crucial role in your decision making. When you assess the possible consequences of a decision, for example, you will be evaluating. But you also evaluate in the other two circles: the team and the individual.

Why evaluate the team or get the team to evaluate its ways of working together? Because that is the principal way to build or develop the team. No team is perfect.

Many are good; a few are very good; and still fewer are excellent.

Here are some of the criteria or hallmarks of an excellent, high-performance team:

- Clear realistic objectives. Everyone knows what the team's objectives are and what their part in the plan is;
- Shared sense of purpose. By this I do not mean that every member can recite the organization's mission statement, but that you experience what engineers call a 'vector': direction plus energy;
- Best use of resources. All resources belong to the team and are put to work according to priority;
- Atmosphere of openness. There is excellent two-way communication between leader and members, and among members. People can speak openly, without fear of being thought critical. All that matters is to ensure that the best decisions are taken;
- Handles failure. Success is often to be found at the edge of failure. A high-performance team picks itself up quickly after a failure, learns the lessons and presses forward; and
- Rides out the storms. The test of a high-performance team comes in the storms that overcome other, less stoutly made teams. The true evaluation of teamwork is in the difficult, demanding change situation.

When it comes to teamwork, remember that success often breeds failure. Successful teams sometimes become overconfident, even arrogant, and that is when they start making 'below the waterline' mistakes, the ones that can sink your organization. The price of excellence in teamwork is eternal vigilance.

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As a leader, you should have a relationship with each member of the team – an equal but different relationship – as well as a relationship with the team as a whole. That will involve you in talking and listening to each individual. Your observations and conversations may lead you with some of them to take the role of a coach and counselor.

If you work for an organization you may well have to appraise each team member. Appraising or evaluating individual performance is actually a natural expression of leadership. If it is formalized or systematized in your organization, you should take steps to avoid appraisal becoming a bureaucratic routine.

If communication is sister to leadership, then motivation is its brother. 'Motivation' comes from the Latin verb for 'to move'.

There is, of course, a variety of ways to move people: you can threaten them with punishments of one form or another, or induce them with financial rewards. Although motivating others in this way does fall within the compass of leadership as well as management, it is not characteristic of it.

I know that one of the things that leaders are supposed to do is to motivate people by a combination of rewards and sanctions. More recent thought suggests that we motivate ourselves to a large extent by responding to inner needs. As a leader you must understand these needs in individuals and how they operate, so that you can work with the grain of human nature and not against it.

In this field as in the others, it is useful for you to have a sketch map. Individual needs should be arranged in an order of prepotence: the stronger at the bottom and the weaker (but more distinctively human) at the top. The hierarchy of needs includes five categories:

- Physiological – our physical needs for food, shelter, warmth, sexual gratification and other bodily functions;
- Safety – the need to be free from physical danger and the need for physical, mental and emotional security;

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- Social – the need for belonging and love, to feel part of a group or organization, and to belong or to be with someone else. Implicit in it is the need to give and receive love, to share and to be part of a family;
- Esteem - needs fall into two closely related categories: self-esteem and the esteem of others. The first includes our need to respect ourselves, to feel personal worth, adequacy and competence. The second embraces our need for respect, praise, recognition and status in the eyes of others; and
- Self-actualization – the need to achieve as much as possible and to develop one's gifts or potential to the full.

There are two interesting points to consider here. First, if one of our stronger needs is threatened, we jump down the steps of the hierarchy to defend it. You do not worry about status (see 'esteem'), for example, if you are starving (see 'physiological'). Therefore if you appear to threaten people's security by your proposed changes, then as a leader you should expect a stoutly defended response.

Secondly, a satisfied need ceases to motivate. When one area of need is met, the people concerned become aware of another set of needs within them. These in turn now begin to motivate them.

There is obviously much in this theory. When the physiological and safety needs in particular have been satisfied they do not move us so strongly. How far this principle extends up the hierarchy is a matter for discussion. Fifty per cent of our motivation comes from within us, as our unique pattern of individual needs unfolds inside ourselves and points us in certain directions. But the other 50 per cent comes from outside ourselves, and especially from the leadership that we encounter. Therefore as a leader you can have an immense effect upon the motivation of those around you. How do you do it?

Inspiration is not quite the same as motivation. 'To inspire' means literally 'to breathe into' – 'inspiration' is a cousin of 'respiration'. Breath was once thought to be life – God's breath. So all inspiration was originally thought to be divine, and leadership itself – at least in its outstanding forms – was regarded as a divine gift.

What is it in a leader that inspires you? Enthusiasm, example, professional ability – there are many strands. But inspiration is found not only in the leader: the situation and the other people involved also contribute to a moment when hearts are lifted and spirits take on new life.

Have you ever reflected on how fortunate you are to have people working in your team who have these seeds of greatness in them? Your task is to locate, release and channel their greatness. It calls for all that is best in you.

Key principles for motivating others:

- Be motivated yourself. If you are not fully committed and enthusiastic, how can you expect others to be?
- Select people who are highly motivated. It is not easy to motivate the unwilling. Choose those who have the seeds of high motivation within them;
- Set realistic and challenging targets. The better the team and its individual members, the more they will respond to objectives that stretch them, providing these are realistic;
- Remember that progress motivates. If you never give people feedback on how they are progressing, you will soon demotivate them;
- Provide fair rewards. Not easy. Do you reward the whole team, or each individual, or both? Either way, the perception of unfair rewards certainly works against motivation; and
- Give recognition. This costs you nothing, but praise and recognition based upon performance are the oxygen of the human spirit.

Just as the language of leadership qualities is a bit imprecise – ‘perseverance’, ‘tenacity’ and ‘stickability’ mean, for instance, roughly the same thing – so the language of functions is also imprecise. Organizing is the function of arranging or forming into a coherent whole. It can mean systematic planning as well, but that is a function we have already covered. It encompasses the structuring – or restructuring – that has to be done if people are to work in harness as a team, with each element performing its proper part in an effective whole. You may, for example, break a larger group down into smaller subgroups.

At first sight you may think that the organizing function belongs more to the strategic and operational levels of leadership rather than to your role as a team leader. You are probably right as far as such factors as the size and structure of your group are concerned, or indeed its relations with other groups in the organization. But here I suggest that the organizing function concerns more than structuring or restructuring the architecture of organizations. If someone is described as a 'good organizer', what is meant by that phrase?

Much of the ground here has been covered already, such as being clear about the objectives, making a workable plan and structuring the group so as to facilitate two-way communication, teamwork and the appropriate measure of control. But there are three other aspects to be considered: systems, administration and time management.

Organizers tend to organize things by introducing systems. A 'system' is almost a synonym for an 'organization': a set of interrelated parts making up a whole. But 'system' can refer to processes – orderly or structured ways of doing things – as well as social structures.

Now you cannot run anything (even a fish and chip shop) without systems: production systems, selling systems, financial systems and so on. In large organizations there is a variety of other systems, such as an appraisal system or a quality control system.

A good leader understands the importance and value of systems. Almost by definition it is impossible to think of organizations that do not have systems or definite ways of doing things, although they are not always immediately apparent. Good leaders respect and work through the systems, changing them if need be. But they are not bound by them, like prisoners shackled in chains. They know when a system is becoming counterproductive.

Moreover, every system – if you think about it – requires teamwork to make it effective. So we come back to that core metafunction of leadership: building and maintaining the team. Have you noticed, too, that systems do not learn? Only people learn! Indeed, left to themselves systems are subject to one of the laws of

thermodynamics: they run down and atrophy. To keep systems – the very essence of a corporate body – fit and healthy, good leadership at all levels is needed.

Administration is usually linked to management skills rather than leadership skills. You may be able to recall a leader you have met who was full of entrepreneurial spirit, enthusiasm and drive, a motivator of others but completely useless as an organizer and administrator. Indeed, 'industrial administration' was once the name for what we now call 'management'. The only relic of those days is the MBA – Master of Business Administration.

Administration, as we all know, involves paperwork and is primarily concerned with the day-to-day running of things. It usually includes financial administration of various kinds and levels.

Now the key thing to remember is that administration is always secondary to something else. It is a servant function. Minister is the Latin word for 'servant'; it comes from the familiar minus, 'less' (as opposed to the magister, 'master', derived from magis, 'more').

In the old days, when organizations were overstaffed, you as the leader (alias magister) could delegate all the day-to-day paperwork to your staff. But these days leaders – equipped with personal computers – will often have to do a great deal more administration than in the past, especially at team leader level. So being a good administrator is now a part of being a good leader.

Taking on this administrative responsibility of leadership is a way of becoming a good facilitator, for you are thereby freeing the team as a whole and its individual members to be effective, creative and innovative. That does not mean to say that you should do all the administration – far from it. You need to delegate so that you have time to think and time to lead. But you should perform the administration that cannot be delegated (either because of its nature or because you lack anyone to delegate it to) in such a way that you are providing a good example. If you are late and sloppy doing the paperwork in returns, how can you expect others to be on time

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with their returns? Make sure that your team has a reputation for excellence in all administrative matters.

Lastly, seeing you in part as an administrator helps to create real teamwork in the organization. You will come to appreciate more and more the contributions of those in the 'back room' of the enterprise, those who are primarily administrators. Their work may be more mundane and more behind-the-scenes, but it is vital to the success of the organization as a whole and to your team in particular. Remember to share your success with these invisible members of your team!

Leaders need time to think, time for people – customers as well as team members – and time to grow the business. Therefore they should be skilled managers of their own time. If you cannot organize yourself, how can you organize anyone or anything else? Administering that scarce resource, your own time, is the priority for any leader.

Exercise: Keep a log of how you spend your time over a two-week period, if possible charting every half-hour at work. Then go through it putting a 'T' for 'Task', 'TM' for 'Team Maintenance', and 'I' for 'Individual Needs' beside each item. You may of course put more than one of these code letters beside each item.

This exercise, properly done, will give you an idea of how much of your key resource – time – is not being spent in your core role as a leader. Now ask yourself, 'What am I being paid to do?'

Time management is made up of applying some underlying principles – know your purpose, aims and objectives, for example – and some practical policies and tips. Learning to say no, which sounds so simple, can save you a bundle of time.

Question	Yes	No
Can you organize your personal and business life in ways that would improve your effectiveness as a leader?		

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Can you delegate sufficiently?		
Can you identify improvements in your time management?		
Team		
Is the size and make-up correct?		
Should a sub-team be set up?		
Are opportunities and procedures in place to ensure participation in decision making?		
Do you restructure and change individuals' jobs as appropriate?		
Organization		
Do you have a clear idea of its purpose and how the parts should work together to achieve it?		
Are effective systems in place for training, recruitment and dismissal?		
Do you carry out surveys into the size of teams, number of leadership levels, growth of unnecessary complexity, line and staff cooperation and properly working communications systems?		
Are you good at administration, recognizing the performance of administrators and ensuring that administrative systems facilitate excellent performance from teams and individuals?		

Checklist: testing your organizing function ability

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Leadership is example,'. Certainly it is impossible to think of leadership without example. It may take many shapes and forms, but it has to be there.

In the context of communication, you can think of example as a prime means of communicating a message through 'body language' or non-verbal communication. Or, as the modern management proverb puts it, you have to 'walk the talk'.

A short course on leadership:

The six most important words... 'I admit I made a mistake.'

The five most important words... 'I am proud of you.'

The four most important words... 'What is your opinion?'

The three most important words... 'If you please.'

The two most important words... 'Thank you.'

The one most important word... 'We.'

And the last, least important, word... 'I.'

Remember that you cannot avoid being an example of some kind or other, simply because the people who work with you will always observe what you are and what you do as well as what you say. 'A manager will take six months to get to know his staff,' goes a Japanese maxim, 'but they will take only six days to get to know him.' Example, in other words, is just you. But you do have by some discretion as to whether it will be a good or poor example.

Exercise: Look back over your career and see if you can identify two people who have been astounding examples of good and bad leadership. List on paper the non-verbal ways in which these examples were expressed. What, in each case, were the

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effects on you? Did others notice their example? What effects did their example have on the group or organization?

As a general principle, we notice bad example more than good. It shouts at us more. It is always a pleasure to see good example, however, even if others seem impervious to it. It is always a sign of integrity: that wholeness that binds together what you say with what you do. A hypocrite – one who publicly preaches one thing and acts quite differently in private life – is neither setting an example nor expressing integrity. ‘Do not, as some ungracious pastors do,’ wrote Shakespeare, ‘show me the steep and thorny way to heaven, whilst... him- self the primrose path of dalliance treads.’ There you have it.

‘Pastor’ means ‘shepherd’. In ancient times the role of the shepherd was a model for leadership. For the shepherd had to lead his flock – or hers, because women as well as men herded sheep – on a journey to pasture (task), hold it together as a unity when wolves threatened (team maintenance) and care for each sheep (individual needs). The word ‘good’ in the New Testament phrase ‘I am the good shepherd’ means in the original Greek ‘skilled’ or ‘competent’, not ‘good’ in the moral sense.

Checklist: test if you set a good example

Question	Yes	No
Do you ask others to do what you would be unwilling to do yourself?		
Do people comment on the good example you set in your work?		
Does your (bad) example conflict with what all are trying to do?		
Can you quote when you last deliberately set out to give a lead by example?		
Can you think of ways you could lead by example?		
Do you mention the importance of example to team leaders who report to you?		

What is a good example? Again, the three-circle model can help us. Look at ‘Key questions for good leadership’ below.

One very powerful form of leading by example is sharing fully in the dangers, hardships and privations experienced by the team. What do you think of the chief executive and board of directors of an ailing, publicly quoted company who voted themselves a 60 per cent pay rise while downsizing the work- force and insisting that the remaining staff accepted only 2 per cent (less than the rate of inflation)?

Key questions for good leadership:

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- Task. The core action of going out in front on the journey in order to show the way is a form of leading by example. How can you 'lead from the front' in your field?
- Team. As a builder and maintainer of the team you need to maintain or change group standards – the invisible rules that hold groups together. How can you develop your team's standards through the power of example?
- Individual. Think of each team member as a leader in his or her own right. Each should be a leader in his or her technical or professional role, and a 'three-circle' contributor.

You can see now the importance of this function of providing an example, but can it be done with skill? At first sight, no, as 'skill' implies a conscious learning of an art. To set an example consciously in order to influence others seems to be rather manipulative.

MOTIVATION

The definition of motivation is to give reason, incentive, enthusiasm, or interest that causes a specific action or certain behavior.

Motivation is present in every life function. Simple acts such as eating are motivated by hunger. Education is motivated by desire for knowledge. Motivators can be anything from reward to coercion.

A common place that we see the need to apply motivation is in the workplace. At work, we can see motivation play a key role in leadership success. A person unable to grasp motivation and apply it will not become or stay a leader. It is critical that anyone seeking to lead or motivate understand "Hewlett's Hierarchy of Workplace Motivators."

Another place motivation plays a key role is in education. A manager that implements motivational techniques will see increased participation, effort, and improved results. Part of the manager's job is to provide an environment that is motivationally charged. This environment accounts for staff that lacks their own internal motivation.

One of the first places people begin to set goals for themselves is in school. Ask any adult: "What is the main thing that motivates you." Their answer will most likely be goals. Even the simplest things in life are the result of goal setting. A person may say, "I want to save \$300 for a new T.V." Well, that is a goal. School is where we are most likely to learn the correlation between goals and the definition of motivation. That correlation is what breeds success.

Salary, benefits, working conditions, supervision, policy, safety, security, affiliation, and relationships are all forms of external motivation. These are the first three levels of "Hewlett's Hierarchy" When these needs are achieved, the person moves up to level four and then five. However, if levels one through three are not met, the person becomes dissatisfied with their job. When satisfaction is not found, the person

becomes less productive and eventually quits or is fired. Achievement, advancement, recognition, growth, responsibility, and job nature are internal motivators. These are the last two levels of "Hewlett's Hierarchy." They occur when the person motivates themselves (after external motivation needs are met.)

An employer or leader that meets the needs on the "Hewlett's Hierarchy" will see motivated employees and see productivity increase. Understanding the definition of motivation, and then applying it, is one of the most prevalent challenges facing employers and supervisors. Companies often spend thousands of dollars each year hiring outside firms just to give motivation seminars.

So, as you can see, motivation is what propels life. It plays a major role in nearly everything we do. Without motivation, we would simply not care about outcomes, means, accomplishment, education, success, failure, or employment.

Types of motivation

There are two main kinds of motivation: intrinsic and extrinsic. Intrinsic motivation is internal. It occurs when people are compelled to do something out of pleasure, importance, or desire. Extrinsic motivation occurs when external factors compel the person to do something. However, there are many theories and labels that serve as sub titles to the definition of motivation. For example: "I will give you a candy bar if you clean your room." This is an example of reward motivation.

Extrinsic motivation

Extrinsic motivation refers to motivation that comes from outside an individual. The motivating factors are external, or outside, and include rewards such as money or grades. These rewards provide satisfaction and pleasure that the task itself may not provide.

An extrinsically motivated person will work on a task even when they have little interest in it because of the anticipated satisfaction they will get from some reward. The rewards can be something as minor as a smiley face to something major like fame or fortune. For example, an extrinsically motivated person who dislikes math may work hard on a math equation because wants the reward for completing it. In

the case of a student, the reward would be a good grade on an assignment or in the class.

Extrinsic motivation does not mean, however, that a person will not get any pleasure from working on or completing a task. It just means that the pleasure they anticipate from some external reward will continue to be a motivator even when the task to be done holds little or no interest. An extrinsically motivated student, for example, may dislike an assignment, find it boring, or may have no interest in the subject, but the possibility of a good grade will be enough to keep the student motivated in order for him or her to put forth the effort to do well on a task.

Intrinsic motivation

Intrinsic motivation refers to motivation that comes from inside an individual rather than from any external or outside rewards, such as money or grades.

The motivation comes from the pleasure one gets from the task itself or from the sense of satisfaction in completing or even working on a task.

An intrinsically motivated person will work on a math equation, for example, because they like math and it is enjoyable. Or an intrinsically motivated person will work on a solution to a problem because the challenge of finding a solution provides a sense of pleasure. In neither case does the person work on the task because there is some reward involved, such as a prize, a payment, or in the case of students, a grade.

Intrinsic motivation does not mean, however, that a person will not seek rewards. It just means that such external rewards are not enough to keep a person motivated.

An intrinsically motivated student, for example, may want to get a good grade on an assignment, but if the assignment does not interest that student, the possibility of a good grade is not enough to maintain that student's motivation to put any effort into the project.



Requisites to motivation

- We have to be Motivated to Motivate
- Motivation requires a goal
- Motivation, once established, does not last if not repeated
- Motivation requires Recognition
- Participation has motivating effect
- Seeing ourselves progressing Motivates us
- Challenge only motivates if you can win
- Everybody has a motivational fuse i.e. everybody can be motivated
- Group belonging motivates

KEY ELEMENTS OF MOTIVATION

Motivation has three key elements:

- Intensity
- Direction
- Persistence

Intensity

It determines how hard a person tries. This is the element most of us focus on when we talk about motivation.

Direction

Intensity alone is nothing there must be proper direction where to go.

Persistence

It is the measure of how long a person can maintain his efforts. Motivated individuals stay with a task long enough to achieve their goals.

Motivation in the Workplace

Introduction

Many business managers today are not aware of the effects that motivation can (and does) have on their business, and it is important they learn and understand the factors that determine positive motivation in the workplace. The size of your business is irrelevant: whether you are trying to get the best out of fifty of your staff or just one, everyone needs some form of motivation. Motivation is something that is approached differently by different businesses and the responsibility of its integration lies with all immediate supervisors of staff. However, it is the business owner who must initiate motivation as a strategy to attain corporate goals.

Motivation in the workplace is one of the greatest challenges for managers. High levels of motivation are directly connected to high levels of productivity. Increasing productivity is always a major goal of managers in any organization. A lack of motivation in the workplace is a major issue for managers and is associated with employees who see no value in the work that they do or see no reason to achieve the goals set out for them (incentives). Therefore, understanding the role that motivation, both internal and external, can play in the workplace is crucial to creating a working environment in which all can succeed and thrive. Unfortunately, increasing motivation can be a tricky endeavor, one that has its pros and cons.

What is Motivation?

Motivation is the force that makes us do things: this is a result of our individual needs being satisfied (or met) so that we have inspiration to complete the task. These needs vary from person to person as everybody has their individual needs to motivate themselves. Depending on how motivated we are, it may further determine the effort we put into our work and therefore increase the standard of the output.

When we suggest factors (or needs) that determine the motivation of employees in the workplace, almost everyone would immediately think of a high salary. This answer is correct for the reason that some employees will be motivated by money, but mostly wrong for the reason that it often does not satisfy, especially long-term. This supports the statement that human motivation is a personal characteristic, and not a one fits all option.

Importance of Motivation in workplace

Motivation can have an effect on the output of your business and concerns both quantity and quality. See it this way: your business relies heavily on the efficiency of your production staff to make sure that products are manufactured in numbers that meet demand for the week. If these employees lack the motivation to produce completed products to meet the demand, then you face a problem which could lead to disastrous consequences. The number of scenarios is extreme but you get the general picture.

Your employees are your greatest asset, and no matter how efficient your technology and equipment may be, it is no match for the effectiveness and efficiency of your staff.

Motivational Theory: Herzberg's Two Factor Theory

Motivation has been studied for many years, since before the 19th century. A number of theorists have compiled their own conclusions and consequently a wide variety of motivational theory has been produced. Fredrick Herzberg's research outlines the main issues concerning motivation.

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In 1966, Herzberg interviewed a number of people in different professions at different levels to find out two things:

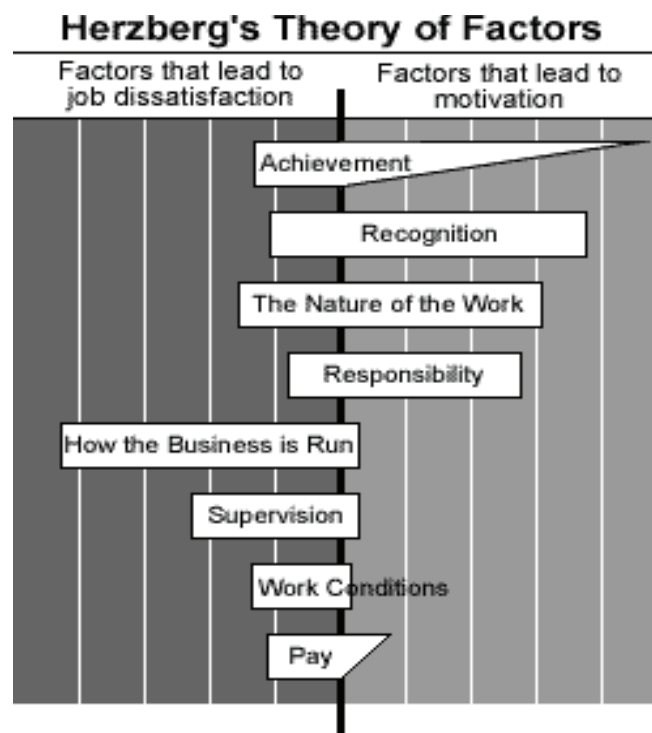
- Those factors that MOTIVATED them in the workplace

These were identified as factors that gave employees an incentive to work, resulting in job satisfaction. They are also referred to as 'motivators'. These motivators increased the job satisfaction of the employee and further increased their efficiency.

- Those factors that PREVENTED JOB DISSATISFACTION

These were identified as factors that prevented job dissatisfaction. These did not improve job satisfaction, but just removed the unhappiness out of working. They are also referred to as 'hygiene' factors. If hygiene factors were not satisfied, it would negatively affect employee efficiency.

Herzberg believed that all factors fell into either one of these categories, or fell into both categories although they held a stronger position in one of them. See the diagram below for examples of the factors that he determined for each category.



By looking at the diagram, it shows that a sense of achievement, recognition of their effort, the nature of the work itself, and the desire for responsibility are all strong factors for motivation. At the bottom of the diagram, the way the business is run, how they are supervised, the work conditions and their pay, are all factors that can lead to job dissatisfaction if the standards of the employee are not met.

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The size (or width) of the bars that represent each factor compensate for the level at which it is a concern. For example, from the diagram, the way the business is run is a higher cause of dissatisfaction (if it is run badly) than the concern of bad working conditions. You may look at 'pay' and think that this bar should be a lot wider on the job dissatisfaction side, but most people would not take the job in the first place if they considered the pay as 'totally unacceptable'.

Take another example: the employee does not see the lack of personal responsibility as major job dissatisfaction, but when people do seek responsibility, it is a huge motivational factor for them: hence the long extension of the bar more on the motivation side of the diagram.

You will further notice that those factors encouraging motivation (job satisfaction) have little connection with money and are more associated with personal development and achievement. Hygiene factors concern more the employee's personal attitudes towards the context of their job, and involve money in most cases to provide a solution to the issue.

You may also have noticed that two bars on the diagram (Achievement and Pay) are shaped differently. This is to illustrate that, for Achievement, it is something that is only acquired for a short term and is therefore an ongoing need that is searched for over and over again. In other words: one week you may achieve, say, a good personal sales figure, and the following week your standard drops to a disappointing level in which you seek to achieve this figure yet again. The Pay factor (salary) also has a similar concern: you may increase an employee's salary that removes job dissatisfaction at first, but in time (can be a matter of days) the employee will increase their personal spending to what they are earning and will eventually, again, become dissatisfied. In such a case, it may be for your benefit that you offer an additional incentive to keep the employee further satisfied to prevent this on-going cycle from occurring.

How Can You Increase Employee Motivation

Popular Motivational Strategies

- **Empowerment:**
 - The process of enabling workers to set their own work goals, makes decisions, and solves problems within their sphere of responsibility and authority.
- **Participation:**
 - The process of giving employees a voice in making decisions about their own work.

New Forms of Working Arrangements

- Flexible work schedules.
- Job sharing.
- Compressed work schedules.
- Telecommuting.

Reward Systems

- **Reward system:**
 - The formal and informal mechanism by which employee performance is defined, evaluated, and rewarded.
- **Merit system:**
 - A reward system whereby people get different pay rises at the end of the year depending on their overall job performance.
- **Incentive system:**
 - A reward system whereby people get different pay amounts at each pay period in proportion to what they do.

Managerial Actions for Increased Motivation

Motivation is achieved through different factors with different people. It is therefore important that you find out these factors for each employee which can be put into action once identified. The best way of identifying these factors is to issue an Employee Appraisal.

If your business has a small number of employees that you can supervise and control easily, then you will probably have an idea what motivates each person and therefore not have to use the appraisal process to determine such factors (although

you should use one for other reasons that concern the performance of your employees). If your business does have a large number of employees that you cannot control at any one time, then you may decide to delegate the task of identifying motivational issues to assistant managers or immediate supervisors of the employees, etc.

For you to motivate your employees, you have to identify which approach to take: do you offer a financial or non-financial incentive? This will depend on what factors motivate the staff member but it may also be restricted by your company budget which cannot compensate for any wage increases or bonuses and therefore non-financial incentives have to be introduced. Poor pay may lead to staff being dissatisfied at work and therefore any non-financial incentives may not be effective for motivation. It is therefore important that you find the right balance between the two.

- **Financial Incentives**
- **Non financial Incentives**

Financial Incentives

Increasing motivation through financial rewards is a method that is most common when businesses rely on the quantity of the output of employees. For those employees involved in production, you could issue a piece rate system where they are paid for each individual product they produce. In which case, they would be motivated to produce as much as possible in order to achieve a high pay: but ensure your quality control is effective to ensure customer focused areas are not traded-off for quantity. You could also introduce a **commission payment scheme** if your business relies on selling your product or services through the means of personal sales (telephone, door-to-door, etc.).

You may even introduce **fringe benefits** (instead of increasing wages or salaries) such as company cars, private health, or interest-free loans from the business. These benefits are often valued higher than wage increases and can be less expensive for the business to provide.

Another financial incentive is the offer of a **share of the company profits**, say, 5 per cent, which is split between your employees. This incentive can influence team-working in the business but you may find that some people benefit from other people's work if they do not pull their own weight to help increase efficiency. It can therefore be said that profit sharing does not encourage motivation in all employees although it is highly effective in businesses with few employees. This is because they know that their performance will make a difference and will be evidenced by an increase in the business profits.

Sometimes staff may only have motivation to get a task done quickly without care to the quality of the outcome. In which case, you can introduce quality-related **bonus pay** which determines their salary. This will be up for review twice a year and reflects their value in the business with respect to, for example, the standard to which they complete tasks as well as personal sales records, achievements, and so on. This will give the employee the motivation to complete tasks to a high standard and a desire to further excel in the future in order to gain a higher salary: and of course, the feeling of achievement (priceless).

Non-financial Incentives

You may feel that **money is not an effective motivator** in your business. It may have some effect in the short term, but your employees may also see factors aside from money as prime motivators. For whatever reason you decide that non-financial incentives are more effective in your business, there are many forms in which they can be given.

You can increase motivation by giving employees more **responsibility** so that they feel their contribution is more valuable to the business and that their role is of higher importance. Further, you can promise the chance of promotion if they reach a certain standard or target. The process of **appraisal** is a huge motivator to employees. This is because they will be recognized for the value they add (or do not add!) to the business by reviewing their progress and achievements over a certain period.

The following are also motivators that can be introduced in your business. To some degree they can also be seen as processes that reduce job dissatisfaction:

- **Job Enlargement**

This involves expanding the job of an employee that has them doing more work of a similar nature to what they already do. This may be allowing them to complete the whole task instead of just part of it.

For example, packaging the products as well as manufacturing them. This process ideally removes the boredom out of the job by eliminating the repetitiveness of tasks and allowing them to complete the whole process, further increasing their responsibility.

- **Job Rotation**

This involves allowing employees to change the nature of their job periodically. For example, you may give the employee administration duties one week, marketing the week after, and then back to their original job of sales the following week. This cycle will then be ongoing. The purpose of this is that the employee, again, is satisfied by reduced boredom and also motivated by the achievement of increased skills. The business owner gains from cross-training and the potential for feed-back and improvement ideas.

- **Job Enrichment**

Similar to job enlargement, you can enrich an employee's job by expanding their tasks to give a higher level of responsibility in the nature of work they do.

For example, they can be given the responsibility of ordering materials and making delivery arrangements instead of just manufacturing the products. This will not only expand their skills, but also give them an increased challenge (responsibility).

- **Job Redesign**

Designing a better fit between workers and their jobs

- Combining tasks

- Forming natural work groups
- Establishing client relationships.

- **Modified Work Schedules**
 - Work share programs
 - Flextime programs and alternative workplace strategies
 - Telecommuting and virtual offices.

Others include:

- Positive reinforcement / high expectations
- Effective discipline and punishment
- Treating people fairly
- Satisfying employees needs
- Setting work related goals
- Restructuring jobs
- Base rewards on job performance.

The 10 Commandments of Workplace Motivation

When the workplace rules are followed, morale improves. When we break the rules, motivation deteriorates. Managers spend too much time in denial by insisting that they are building a motivating workplace when, in fact, they are often sabotaging it. A motivating work environment is the responsibility of everyone. Gone are the days when we look solely to managers to motivate. Below are 10 Commandments that must be adhered to by everyone in your organization if you want to build the kind of workplace where everyone thrives.

- **Build Self-respect**

Positive reinforcement allows people to understand that their performance adds value to the organization. Receiving positive strokes gives employees a sense of satisfaction that creates the initiative to try new ideas and take bigger risks.

We can never have enough self-respect. Ever notice that the office "egomaniac" is usually the person who actually has the lowest level of self-respect? The more obnoxious and toxic they become in their bragging, the less we feel like feeding their egos with strokes.

No matter how confident or comfortable we are with who we are, we all have moments of insecurity where our performance drops. Everyone needs strokes.

- **Don't Be Neurotic (or at least disguise it well)**

Employees deserve to have a clear understanding of what behaviors and outcomes are expected of them. Many managers are so unclear that they create the perception that they're intentionally hiding the target. Management teams seclude themselves for strategic planning sessions—an archaic and bankrupt management practice—only to place the resulting notebook on the office shelf, and maybe giving a brief verbal report of the session to their employees. If everyone in the organization isn't involved in "the plan" at some level, they're not committed, period.

- **Show Respect**

Managers often treat employees like the child in a parent-child relationship. An adult-adult transaction requires that we allow employees the latitude to solve problems. Provide guidance with a clear picture of expected outcomes and allow people to think.

- **Live Integrity**

In the Dr. Seuss book, *Horton Hatches the Egg*, Horton the elephant gives his word to a lazy bird named Mayzie that he will sit on her egg until she comes back. Mayzie doesn't come back and Horton perseveres through ice storms, safari hunters, even a trip to the zoo. Through challenges, he continues to

repeat, "I meant what I said and I said what I meant... An elephant's faithful, one hundred percent!"

It is unquestionably true that most people would say that they keep their word. In any day, however, those same people will break their word repeatedly in small ways. Employees spot all the ways that managers miss obligations by small things like not sending out reports that were promised, delaying meetings, etc.

Employees are quick to spot slips in integrity in peers and managers. Instead of confronting the problem directly, they too often fall out of integrity by blaming, gossiping, and whining. Living in integrity means keeping our word and speaking a deeper truth.

- **Be Fair**

In a world where there isn't much that is fair, we need to find ways be as fair as possible. Fair doesn't mean equal. Paying for performance isn't fair if you cap the incentives that a star performer can receive. If you reward employees for cost savings or an increase in revenue, the additional money is always there to share because that extra money wouldn't have been there without help from that employee.

- **Value and Reinforce Ideas**

According to an Employee Involvement Association study, the average employee in Japan submits 32 ideas for improvement per year, compared to the average employee in the United States, who submits 0.17. This is a ratio of 188:1. This problem stems from the fact that only 33 percent of U.S. employees' ideas are adopted, compared to 87 percent from Japanese workers.

If we expect people to give us their ideas for improving the organization, we need to have a serious system for evaluating and implementing those ideas.

People who submit ideas are entitled to a quick decision and an explanation of why their idea was or was not accepted.

- **Give Them What They Want**

My mother loves crafts. I love books. Every year for Christmas, my mother has given me crafts. I give my mother books. What's wrong with this picture? We love to give what we actually love to receive. But sometimes we forget whom we are giving to.

Each of your employees has a different idea of how they prefer to be rewarded. Money, trips, educational opportunities, promotions, verbal recognition—everyone prefers to be rewarded in a way that's meaningful. If you don't know what they want, ask them.

- **Give Immediate Feedback**

Who created the annual performance review anyway? By itself there is really nothing wrong with it, but somewhere along the path, we assumed that all feedback gets stuck in a file and delivered yearly. The problem with this approach is that inappropriate behavior becomes habit by the time the employee hears about it. Worse yet, you lose the benefit of re-energizing your people with the substantial immediate impact of positive reinforcement for a project well done.

- **Reinforce the Right Things**

One of the companies I've worked with for believed that good employees come to work early and stay late. Not surprisingly, the CEO came to work early and stayed late. When a new CEO took over, he emphasized performance—and productivity went up miraculously. Those same employees did more work in less time. Watch what you reinforce because you will undoubtedly get more of it.

- **Serve Others**

We've all seen it in our mission statements. "To be a leading provider of blah, blah services in our service area providing quality service and a good return to our stakeholders." To say we are in business to profit is like saying we are breathing to remain alive. Every thriving organization is passionate about serving their customers. When we focus on our customers' success, we enroll our hearts, minds, and souls as opposed to simply working from our job descriptions.

If you want to improve the motivation at your workplace, use these 10 Commandments.

Conclusion

Without motivation in the workplace, your business will suffer from the lack of efficiency that your employees may fail to apply. This is because they have no incentive to perform tasks to a high standard or complete them on time. It is therefore important that you give them something to work for as a reward for their high level of performance, all being essential to the success of your business.

Everyone is motivated by different things and a majority of these factors are not money orientated: instead they react more effectively to incentives that offer personal recognition and achievement. In which case, you should determine what motivates individual people and further determine whether a financial or non-financial incentive is the solution.

There is a fine line between factors that motivate people and factors that prevent job dissatisfaction. In other words, some things do increase the level of efficiency in employees by reducing job dissatisfaction but are not motivators themselves. This is because your staff needs to eliminate unhappiness in their job before they can begin to be motivated and this usually begins with an acceptable wage that they can live on.



KPI'S

Key Performance Indicators (KPIs) are quantitative and qualitative measures used to review an organization's progress against its goals. These are broken down and set as targets for achievement by departments and individuals. The achievement of these targets is reviewed at regular intervals.

KPIs are used to monitor the performance of a company, department, process or even an individual machine. They will also help shape the behaviors of employees within the company.

KPIs need to be flexible and reflect the changing goals of the organization. Goals change as the organization changes in reaction to external factors or as it gets closer to achieving its original goals.

Individual KPIs need to be directly linked to organization goals and objectives, or overall organization KPIs where they are used.

They need to reflect organization culture and values, by indicating the types of behavior and performance the organization will recognize as 'successful' and reward employees for.

KPIs need to be measurable and reflect a balance between operational and people orientated measures.

KPIs are a fundamental component of sustaining a change process and maintaining a performance management culture. KPIs should be aligned with the organization's vision and direction.

When performance is measured, and the results are made visible, organizations can take action to improve.

SMART KPIs

The acronym SMART is often used to describe KPIs:

- **S**pecific;
- **M**easurable;
- **A**chievable;
- **R**elevant; and
- **T**imely.

Specific

KPIs need to be specific to the individual job and if possible expressed as statements of actual on-the-job behaviors.

For example, a KPI should:

- explain clearly to the employee what he/she has to do in terms of performance to be successful
- have an impact on successful job performance, that is distinguishing between effective performance and ineffective performance
- Focus on the behavior itself, rather than personality attributes such as 'attitude to customers'.

Terms such as 'work quality', and 'job knowledge' are too vague to be of much use.

Measurable

KPIs must be measurable, that is based on behavior that can be observed and documented, and which is job-related. They should also provide employees with ongoing feedback on their standard of performance.

Achievable

Performance management needs to be an open, collaborative communication process. KPIs must be seen by all that they are achievable. The KPI must be realistically achievable. If it is set too high for the circumstances (such as an ambitious production target), not only will it be irrelevant but it will ensure failure.

Relevant

It is essential that employees clearly understand the KPIs, and that they have the same meaning to both parties. Consultation is more likely to result in standards that are relevant and valid.

Timely

KPIs should have an appropriate time frame.

It should be possible to collect the relevant information either 'as it happens' or within a short time afterwards, otherwise it will lose its relevance.

As outputs of the performance management system, KPIs also need to be in alignment with other HR-related functions, including training and development, recruitment and selection, rewards and recognition, and career planning.

Business aspects that require KPIs

KPIs should cover every aspect of the business. Sample examples are:

- customer satisfaction;
- employee satisfaction;
- staff turnover;
- absenteeism;
- department/division specific measures;
- triple bottom line: financial, environmental and social responsibility ;
- finance including revenue and costs;
- OHS reporting including incidents and related costs;
- equipment usage and OEE;
- maintenance costs and effectiveness;
- new product development and innovation;
- lead times and down times; and
- Quality.

KPI components

KPIs should identify the required outcomes, for example:

- the minimum acceptable performance e.g. daily breakeven point
- Target performance e.g. desired daily output.

KPIs should:

- be communicated to all staff so that they are aware of how they are to be measured and how their KPIs impact on the organization as a whole

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- be aligned with the vision and direction of the organization
- Have relevant reward and recognition criteria linked to each KPI.

When implementing new KPIs, having baseline data to measure improvements is very important. Progress on KPIs should be communicated at regular times to highlight emerging trends. As these trends emerge, corrective action can be implemented in a timely fashion. KPIs need to be communicated via multiple media. The measures that are selected must be carefully specified to ensure they do not cause non-lean behaviors. In many cases there will need to be a selection of measures that balance quality and quantity factors to ensure the correct behaviors are encouraged.

Listed below are some examples of the behaviors and outcomes that measures in isolation can cause.

Measure in isolation	Behavior	Outcome
Production output	Make more	Overproduction
Machine efficiency	Run machine longer Run in most efficient sequence for machine	Unnecessary stock Customer orders late
Maintenance costs	Reduction in maintenance activities to reduce costs	Machine breakdowns
Cash flow performance	Pay suppliers as late as possible	Supplier deliveries XX unreliable

Creating KPIs

KPIs must be designed for each proposed change to the production process so that:

- there is a base line measurement taken to establish a starting performance standard
- there are measures developed to track the team's performance

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- There are measures established that can highlight any variability. This can assist in future diagnoses
- Reward and recognition can be effectively implemented.

Before data is collected three questions need to be asked.

1. What is the purpose of collecting this data?
2. Will this data tell us what we want to know?
3. Will we be able to act on the data we collect?

The goal is to create an easy-to-use, accurate measurement system with as few measures as possible.

The following questions need to be answered when setting up a data collection system:

- What type of metric is it (financial, behavioral or core-process)?
- Why was it selected?
- Where will the data be collected from?
- How will it be collected?
- How often will it be collected?
- How often and where will the metric be displayed?
- Who will use it?

KPI examples

Some examples of measures that can be used to monitor the performance of a competitive manufacturing company are listed below.

Financial	Examples
Costs	Material costs Labor costs Operations costs Inventory Overtime Warrantee costs Cost of Sales Interest on overdraft Number of projects completed on

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	time and on budget
Revenue	Sales Gross margins Return on assets or investment Product profitability
Team metrics	Overtime Material costs Revenue generated by team Inventory value in team's area Number of projects completed on time and on budget

Core metrics	Examples
OHS	Lost time injuries Number of staff off work Length of time staff are off work
DIFOT	Delivery in full on time
Quality	First time through quality Yield
Lead-time	Order to cash in bank Raw material to dispatch Dock to dock

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Inventory	Inventory turnover rate
OEE	Overall equipment effectiveness
Schedule performance	per cent changes to the weekly schedule
Value added ratio	Ratio of value adding time to lead time
Team metrics	Turnaround time for jobs Output rates Quality rates Equipment OEE Attendance rates Schedule compliance Customer feedback Number of deadlines/milestones met Metrics relating to specific team tasks

Behavioral metrics	Examples
Employee satisfaction	Gained from regular Employee Satisfaction Surveys Staff turnover rates Participation levels in improvement activities
Customer satisfaction	Gained from regular Employee Satisfaction Surveys Retention rates

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Skill uptake	Skill matrices
Absenteeism	Absenteeism
Error rates	Error rates Time spent on managing under-performing staff
Team metrics	Number of team meetings Members at team meetings Number of ideas generated Number of ideas implemented Total Savings generated

VALUES, VISION AND MISSION STATEMENTS

The values, vision and mission statements identify what the business is and what it stands for, how it wants to be seen, and how it wants to go forward.

This document offers an overview of what might be included in your values, vision and mission statements.

First Considerations

The values, vision and mission statements set the tone for not only your business plan, but also for your company. They define the path your company will follow and act as a guiding principle by which your company functions.

Your values, vision and mission statements tell your reader;

- what you and your business are all about;
- what your company stands for;
- what you believe in, and
- What you intend to achieve.

Economy of words is critical. This does not necessarily mean that they should be short at the expense of effectiveness, but that each word should be powerful and meaningful.

Be clear and concise and make it obvious what your company is attempting to do.

Is there a difference between a values statement, a vision statement, and a mission statement?

The short answer is, yes! And the differences are:

- Your VALUES define what your business stands for - they are your core rules.
- Your VISION defines how you want your business to be seen externally - by clients, suppliers, investors and even competitors. It's what you constantly strive to attain, and it becomes your reason for being.

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- Your MISSION is what you intend to become or accomplish. It should be challenging but achievable. A well-written mission statement demonstrates that you understand your business, have defined your unique focus, and can articulate your objectives concisely to yourself and others.

The way to think of this is that the VALUES *drive* the VISION which in turn *drives* the MISSION.

Mistakes to Avoid

- Don't regurgitate a description of your business.
- Don't make it boring.
- Don't make it the length of a thesis.
- Don't fake emotion.
- If you don't believe it, don't include it.
- Use only language common within the business
- Don't lie or claim to be something you aren't
- Don't forget to get the input of everyone on your team.

Useful Tips

SAY IT WITH CONVICTION. Let's assume that your Executive Summary clearly outlines your;

- idea;
- business concept
- opportunity
- market
- management team, and
- Investment opportunity.

Let's also assume that it's grabbed the attention of your reader/investor and has inspired them to read on. Moving forward, your reader quickly flips past your Table of Contents and glances at your company's Values, Vision and Mission Statements.

1. What will they read?
2. Is it compelling?
3. Exciting?
4. Does it give them the impression that your company and you are more than just business oriented, but also passionate?
5. What does it tell your reader about you, your company, and your chances of future success?
6. Will it stick in their mind as they read through the other sections of your business plan?

If you can answer yes to these questions, then your values, vision and mission statements have done their job.

Keep in mind that you don't want to 'put the carriage before the horse' in regards to the relationship between your mission statement and your business plan. In many ways, your business plan (i.e. your business) should develop **BECAUSE** you have values, you have a vision, and you have a mission, not because the mission statement is a section in other business plans.

Great values, vision and mission statements will not make up for a poor business plan in the eyes of investors, but an undefined and uninspired mission statement may lead an investor to think twice about the quality of your business and its goals.

The following comments offer brief suggestions and tips to prepare and incorporate an effective mission statement into your business plan:

A mission statement isn't just for the readers of your business plan. Instead it should be viewed as the guiding principle for your entire business. It tells you, your company, your employees, your vendors, your customers, your investors, and your lenders what your goal is, what you stand for, and where you're headed.

Essentially, your mission statement defines your company's values and outlines your organizational purpose and "reason for being".

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A solid business plan is organized to convey information to outsiders about the nature and intentions of your business. A clear mission statement serves as the "guiding light" of your business plan, powerfully condensing the message you want to send to the reader.

A good mission statement is compelling, passionate, and energizing. It should be risky and challenging, but also achievable. If it falls between "we can't do it", but "we will do it anyway" then you're probably on the right track. Also remember that a mission statement isn't written in stone, and is likely to change over time as a business grows and market conditions change. Think of your mission statement like a race; give it a clearly defined finish line and determine a time period when it will be achieved.

Writing a mission statement can be a difficult and challenging task. If you don't know what you stand for and what your company believes in, then it's impossible. If you don't know what principles you operate from and how you will treat those who come in contact with your company, then it's impossible. If you're not excited about what you are doing and lack a passion for your product or service, then it's impossible. Instead of trying to just "write it" or "get it done", devote some serious thought and soul searching to your mission statement. It must boldly state what you, your company, and its future are all about - and it's worth the effort.

A mission statement should require little or no explanation, and its length is less important than its power. One of Nike's now famous mission statements was: "CRUSH REEBOK" It requires no explanation, but it motivates everyone associated with Nike, and the objective is unmistakable. Instead, Nike could have stated their mission as, "to be the best shoe company with the best customer service", but that would have done little to inspire the troops. Don't make that mistake with your own mission statement - make it passionate and inspiring, not bland and boring.

Consider two other famous examples:

- PEPSI - "Beat Coke"
- HONDA - "We will crush, squash, and slaughter Yamaha"

Attempt to keep your mission statement simple, but this doesn't necessarily mean it should be short. Try limiting it to one paragraph, although it could vary anywhere from one sentence to a full page.

Every mission statement should be different. So don't try to use one of the examples above or one that resembles the flavor of your closest competitor.

Instead write a mission statement that reflects your individuality, creativity, and uniqueness.

Use a tone that best reflects the culture of your company, and get as many people as possible involved in its construction. If everyone doesn't buy into your mission statement, then it will not effectively shape your company and its actions, and thus it will lose its effectiveness. So if someone reads your mission statement and comments "great, but who cares" consider rewriting it and adding some passion. The passion and excitement you demonstrate in your mission statement will carry over not only to the rest of your business plan, but also into the day to day operations of your company.



REWARD SYSTEMS

More and more organizations are beginning to redesign their reward systems to reflect team values. Gain sharing and other group bonus systems are becoming more common, as are informal rewards that single out teams, rather than individuals. Teams, just like individuals, respond to both external and internal rewards. Examples of external rewards include pay, bonuses, plaques, notes, and publicity in newspapers, commendations at a company party, certificates, gifts, trips and dinners. Examples of internal rewards include satisfaction from accomplishing the team goal and a sense of well-being deriving from strong work relationships, creative challenges, increased responsibility and learning opportunities.

Special Tips on Team Reward Systems:

- The reward system must be congruent with the culture in the organization and with the overall management style;
- If the evaluation system stresses one set of priorities and the reward system stresses another, the reward system will win out;
- People will work hardest on tasks for which they receive the greatest rewards;
- The reward system must focus on the accomplishments of the team, not individuals;
- Reward and recognition systems geared to individuals are in direct conflict with the idea of teams;
- If the organization is going to give rewards, it is best to do so at the end of a team project, rather than on an annual basis;
- Evaluations based on the amount of time members spend on a team may not provide the best measure of their contribution;
- If a team is not highly autonomous, providing rewards at the team level may be counterproductive;
- Reward systems should make teams accountable to the organization as a whole, as well as to the team; and
- Pay-for-performance and job-based compensation systems do not fit the requirements of self-directed and self-managed work teams because they reward individual accomplishments more than team results.

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Before deciding on a particular reward system, management and the team need to address the following critical questions:

- Who should be included in the reward system (e.g. original suggesters, implementation team)?
- Who should be the recognizer (management, team members)?
- How much money constitutes an effective reward?
- How much information should be shared about how rewards are determined and who gets them?
- How should rewards be handled when the members of the team change during a project?
- What rewards (informal and formal) would be considered meaningful by the team?
- How should rewards differ for different types of teams (cross-functional vs. self-directed)?

Pay Options for Teams

Types of Pay Options	How the System Works	Benefits	Drawbacks
Traditional job-based or pay-for-performance	<ul style="list-style-type: none"> • Rewards individuals on basis of position, seniority, or individual merit. 	<ul style="list-style-type: none"> • Simple; a standard used by most organizations. 	<ul style="list-style-type: none"> • Rewards on an annual scheme. • Focuses on individual achievement – not effective for teams. • Does not encourage people to learn other skills.
Skill based/ Knowledge based	<ul style="list-style-type: none"> • Rewards individuals for acquiring needed skills. Team members test and certify that a new skill has been achieved. 	<ul style="list-style-type: none"> • Encourages acquiring of new team skills. Can attract and retain right skill mix. 	<ul style="list-style-type: none"> • Not effective for teams that meet only several hours per week. • Cost-effective only when persons with needed skills cannot

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			be hired easily.
Gain sharing	<ul style="list-style-type: none"> • Returns a share of the cost savings above a specified and agreed-upon level to all employees. 	<ul style="list-style-type: none"> • Good for project and self-directed work teams. • Increases employee knowledge of the “big picture finances.” • Participatory decision making. 	<ul style="list-style-type: none"> • Requires assistance with implementation and administration. Savings are shared among all, even though a single team may be responsible.
Team Bonus	<ul style="list-style-type: none"> • Team members share in a percentage of the estimated savings when important targets are met or at the end of a project. 	<ul style="list-style-type: none"> • Effective for project teams. • Simple system that works best for teams that stand alone as performing units. 	<ul style="list-style-type: none"> • Estimated cost savings may not be realized. • Members may feel that system is unfair because they receive only a percentage of the savings.
Collective pay-for-performance or merit-pay system	<ul style="list-style-type: none"> • Evaluation is based on the effectiveness of a total unit and team performance appraisals. 	<ul style="list-style-type: none"> • Covers a total organizational unit, rather than individual teams. • Good for project organizations seeking long-term relationships among teams. 	<ul style="list-style-type: none"> • Who should share may become an issue.

Questions and Answers: Overcoming Evaluation Difficulties

1. **Q.** How do you handle people who say they have their “real” work and their team work?
A. People are smart enough to do the work that is rewarded. If an organization puts enough emphasis on customer, quality and teamwork in the evaluation tool, it doesn’t take employees long to change their emphasis. However, if the organization keeps the old evaluation tool, those jobs emphasized in that tool will continue to be the important ones.

2. **Q.** How do you know when to discipline a team member?

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A. The team needs to examine, first, whether the member has the competency to do the job. If not, then the team will need to provide training and/or skill development to bring the competency up to an acceptable level. However, if the competency is there and the team member is simply refusing (lacks the commitment) to do the task, then the team should decide on a disciplinary approach.

3. **Q.** Why would someone refuse to do a task or show low commitment?

A. There are a number of reasons. First, sometimes good work is punished (team members may joke about someone who is prompt or who gets work done on time). Poor behavior is often negatively reinforced because everyone focuses a lot of attention on it (similar to a two-year-olds tantrum). Good behavior is sometimes ignored or, worse yet, rewarded by giving the hard worker additional assignments.

4. **Q.** Are there small rewards a team can be given if you don't have a whole reward system in place?

A. We encourage teams to keep a success log that records every time a goal is achieved or something is handled particularly well. If the team is aware of a cost savings they've achieved, it should be noted on this log. The success log can be posted for all to see or given to top management on a regular basis. One team ring a bell hanging in the office every time they get or complete a large contract. One note: People who grew up being told not to "blow their own horn" may need some time to get used to this idea. However, the visual change in affect that occurs when a team celebrates its success is amazing: eyes let up, posture straightens, smiles abound.

5. **Q.** Are you saying that the traditional pay systems don't work for teams?

A. Pay systems that reward seniority, a single narrow skill, or position by title have little value in a team environment. People repeat behavior that gets rewarded. If pay is based on a set of measurements that emphasize great customer service, great customer service will occur. Therefore, if an organization rewards the number of years someone has worked or the fact that someone holds a particular position, employees will focus more on

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these measures than on team building, collaboration and facilitation. In most companies, changes in the compensation system lag behind the culture change to teams.



VIRTUAL TEAMS

Most of us are familiar with Tuckman’s model of team development which incorporates the stages of forming, storming, norming, performing, and adjourning. Virtual teams require a new model that accounts for the complexities of their work environments. The following model, adapted from J. McGrath, addresses both task performance and social dynamics arguing that both work together to create the team experience.

Task Dynamics

Social Dynamics

Stage	Description	Task Activities	Description	Social Activities
1	Inception	<ul style="list-style-type: none"> • Select Goals • Generate preliminary plans • Generate ideas 	Interaction/ Inclusion	<ul style="list-style-type: none"> • Ensure team member inclusion • Ensure opportunity for participation • Define initial roles
2	Problem – Solving	<ul style="list-style-type: none"> • Select technical problems to be resolved • Solve problems with correct, known answers • Solve ambiguous problems 	Position status/ role definition	<ul style="list-style-type: none"> • Address status of team members • Clarify and refine roles and expertise
3	Conflict Resolution	<ul style="list-style-type: none"> • Resolve conflicts about different points of view • Resolve conflicts stemming from different interests 	Power/ Resource definition	<ul style="list-style-type: none"> • Address power differences between team members • Address interpersonal relationships • Address how different solutions affect power allocation to different functions, regions, and/or countries.
4	Execution	<ul style="list-style-type: none"> • Perform tasks • Address organizational barriers to performance 	Interaction Participation	<ul style="list-style-type: none"> • Ensure equal participation • Ensure effective interaction and communication



MYTHS AND REALITIES OF VIRTUAL TEAMS

What myths have been communicated about GDT's and how do those myths compare with reality?

Myth	Reality
Geographically dispersed teams are not as effective as traditional teams where everyone is located in the same place.	GDT's can match or exceed the performance of other teams for some tasks. They provide an advantage in some areas. Some co-located teams, when brainstorming, lock in on a single idea too early. This happens less frequently with a GDT.
Co-located teams are always preferable.	Face to face interaction is not always the most effective approach. When there are cultural or personal differences electronic communication may be more effective.
Team dynamics are the same.	Research has shown that GDT's develop differently than co-located teams and therefore have different dynamics. (Interventions and/or team building processes may need to be different for GDT's versus co-located teams.)
Team members cannot develop trust.	Trust can develop just as quickly when there is high focus on communication and interaction, regardless of co-location or dispersion. The team should define "trust" and the behaviors it would take to build it.
There is no accountability.	Accountability should be based on measurable outcomes. This means shifting to a results oriented paradigm. Out-of-sight does not mean unaccountable.
When things go wrong it's because of technology.	GDT's fail more often due to lack of "soft skills," not due to lack of technology skills or function. GDT's can use technology to enhance relationship building and speed team development.
There is no difference in roles when comparing aGDT to a virtual or co-located team.	Leader and members' roles are different with GDT's, especially concerning disciplined interaction and communication. Some GDT leaders indicate they spend twice as much phone time with a GDT as with a co-located team. The increased time, especially in the initial project phase, is needed to establish relationships.



TRUST BUILDING AND THE VIRTUAL TEAM

Trust - For a team to work together effectively, its members need to trust one another.

Past studies of traditional teams have shown that trust evolves in three stages:

Deterrence-based trust: Team members do what they say they will do simply because they fear they'll be punished if they don't.

Knowledge-based trust: As members become more and more familiar with one another, they come to know their teammates well enough to predict their behavior with confidence.

Identification-based trust: Trust is built on empathy and shared values; members are able to put themselves in their teammates place.

Although research has found evidence of all three types of trust in virtual teams, this three-stage development pattern is not evident. Rather, in a virtual environment, trust in virtual teams and team members tends to be established – or not - right at the outset; first interactions of team members are crucial. Initial electronic messages appear to set the tone for how members will relate throughout an entire project.

Virtual teams with the highest levels of trust tend to share three traits;

- They began their interactions with a series of social messages (Introducing themselves and providing some personal background) before focusing on the work at hand. This series of interactions is sometimes called “electronic courtship” and appears to be particularly important in establishing knowledge based trust;
- Clear roles are defined for each team member. Assigning each member a particular task enabled all of them to identify with one another, forging a foundation for identification-based trust; and
- Team members consistently displayed eagerness, enthusiasm, and an intense *proactive* action orientation in all of their messages. It was found that one pessimist has the potential to undermine the entire team.

In addition, high trust teams:

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- Display a task vs. procedural orientation; communication is task oriented but still empathic;
- Rotate leaders; alternate members “rise to the occasion”;
- Discuss and clarify team goals;
- Engage in time management and project management activities;
- Give substantial feedback oriented toward improving the content of another’s work; and
- Engage in frequent interaction, notifying members of their whereabouts and absences.

Instant Trust

Studies have shown that all cultures report that there are three factors in building “instant” trust.

1. Perform competently

- Reputation for performance and results
- Follow through
- Obtaining necessary resources

2. Act with integrity (alignment of actions and stated values)

- Alignment of actions and stated values
- Standing behind the team and all its members
- Maintaining consistent and balanced communication

3. Display concern for the well-being of others

- Transitioning people on and off the team so that their careers are affected positively
- The leader and other team members helping one another
- To find next assignments

While all cultures consistently report these three attributes, keep in mind the various cultures display, interpret, and/or prioritize these attributes differently.

Additional strategies to create an atmosphere of trust

It was already stated that trust in virtual teams is built differently and more swiftly than in traditional teams. With that in mind, the following are additional ways to build an atmosphere of trust in a virtual team:

- Build the self-esteem of team members by showing respect for their opinions;
- Help team members focus on the problem rather than blaming each other;
- Serve as a role model by demonstrating constructive behavior (maintain constructive relationships; take initiative to make things better, lead by example);
- Familiarize self and team with why trust is important;
- Take the time, up front, to allow your team members to get to know you and each other. (Take time to be a team; and
- If possible, meet face-to-face early in the development of your team.

Miscommunication and conflicting expectations often arise from the lack of face-to-face contact time among team members. Face-to-face meetings will allow team members to develop relationships and trust much more quickly.

- Set up weekly ½ hour 1:1 sessions with yourself and your team members. This will allow them to get to know you (and you them).

Help team members understand the mission of the team and allow them to voice their concerns in an open manner:

- DWYSYWD. Do what you say you will do. One of the quickest and most effective ways to build trust is to follow through on your commitments. Team members are more likely to trust one another if they feel team members are competent;
- Stand behind your team and your team members. Do not make disparaging remarks about the team's performance in public. If you receive negative information about a team member, be sure to investigate it thoroughly before acting upon it;
- Try to give each team member the opportunity to contribute. Don't rely more heavily on those team members who happen to be in your location; and

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- It is imperative in a virtual environment that organizations establish a clear policy regarding communications privacy and then strictly adhere to it.

THE POWER PROFILE

What is your personal power profile? The table below lists qualities generally associated with personal power. Rate yourself against each one. Then have one or two objective colleagues who know you well do the same. The combined ratings will you a good idea of your strengths and weaknesses. If you eliminate those weaknesses you will increase your personal power.

Your Personal Power Profile

Power Trait	Below Average	Average	Above Average
<i>Trustworthiness.</i> Speaks the truth			
<i>Ability to relate well with others.</i> Understands the value of give and take			
<i>Expertise that others value.</i> Has knowledge or technical expertise that can translate into business success.			
<i>Communication skills.</i> Can communicate views and ideas in compelling ways.			
<i>Accomplishments.</i> Makes contributions that merit admiration and respect.			
<i>Personal charisma.</i> A style that engages the emotions and allegiance of others.			
<i>Powerful and attractive ideas.</i> Always thinking ahead of the pack.			
<i>Focus and enthusiasm.</i> Not easily diverted or discouraged.			
<i>A welcome member of everyone's team.</i> An ability to enlist collaboration among fellow employees.			
<i>Self-confidence.</i> Not shy about speaking up on important matters.			
<i>Energy and endurance.</i> Tireless in pursuit of key goals.			
<i>Reliable.</i> Always does what they say they will do. Can be counted on to have done their homework.			

Where is the power in your organization?

To deal effectively with power, you must understand the power that you and others in the organization have. Like electricity, power is invisible, but you can feel and observe its effects. Start with yourself. What are your sources of power? Are they formal or informal? For example, does your title or position impart any special power? Who is dependent on you? How many well-positioned peers, superiors, or subordinates owe you a debt? What resources do you control? Are you boosting your power through membership in a coalition? Do your personal powers (of communication, visibility, accomplishments, and so on) afford you special power? Is your power greater or less than others whom you are dealing?

Apply the same analysis to those with whom you interact – those above and below you in the chain of command as well as people in other functions who are outside the chain of command. If you are a long-term employee, you can probably point to the people and the departments that have the most power. If you cannot, or if you are new to the company, look for power in these places:

Departments or business units whose leaders have the highest salaries or that pay the highest salaries to newcomers. Salary size is usually a useful indicator of what top management and the board of directors value.

Departments or business units that have the most representation in top management and on the board of directors. For example, some companies reflexively look to finance or the sales organization for their next CEO. In contrast, one would be hard-pressed to find a major organization that ever gave the top job to someone in human resources; that's not where the power is.

The executive conference room. When key decisions about strategy and resource allocation are made, who is at the table?

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Physical proximity to the CEO's office. The odd notion of the palace court continues in our business organizations. People with power usually have offices in the headquarters building close to the top executive's piece of personal real estate.

You can make a tough measurement of you own power, or your boss's power by simply checking these power indicators.

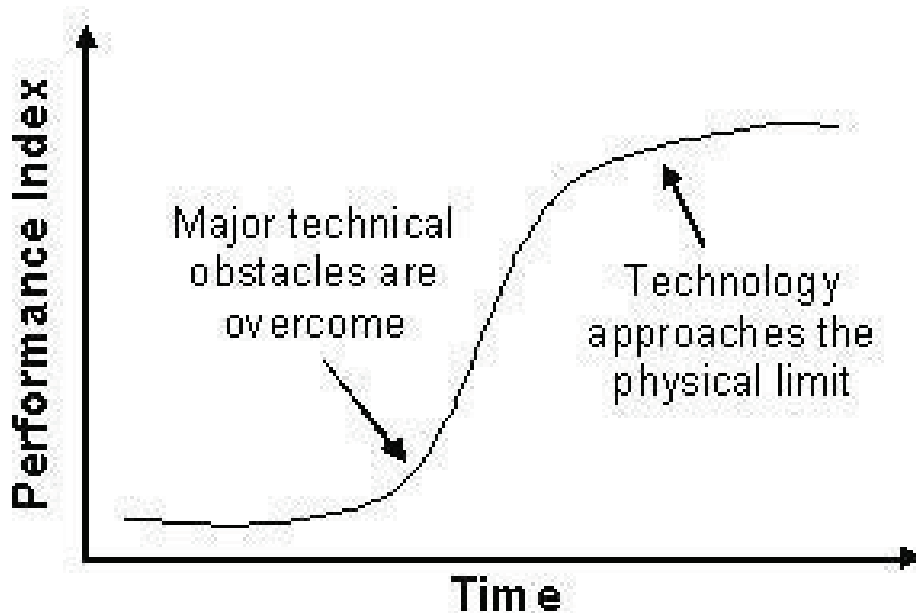
You now understand the three main sources of power in organizations: power of position, relational power and personal power. Understanding these will put you in a much better position to tap into the power you need to get things done.



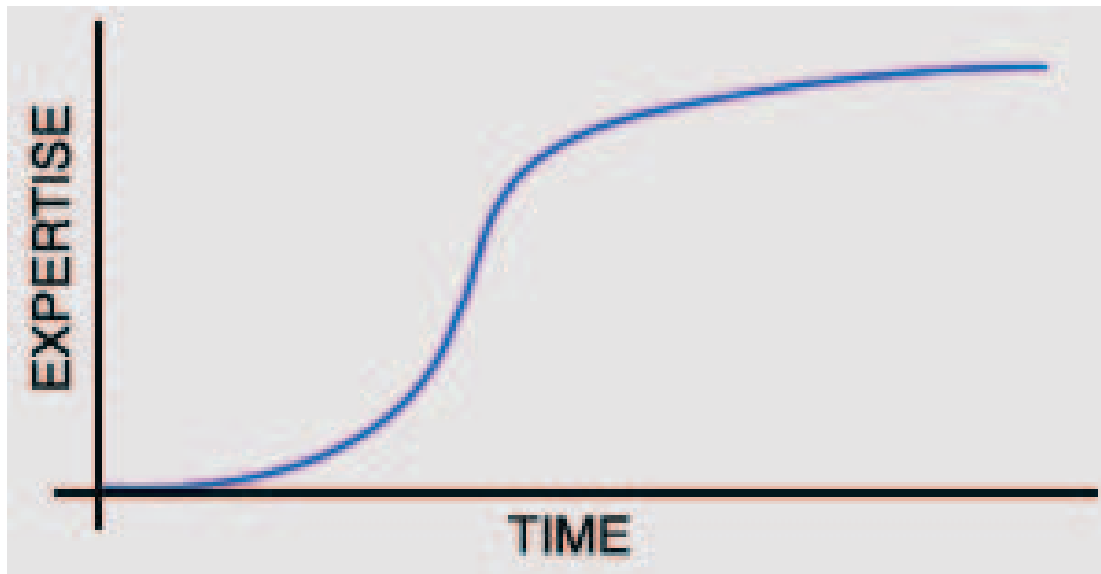
THE S CURVE

The S-Curve emerged as a mathematical model and was afterwards applied to a variety of fields including physics, biology and economics. It describes, for example, the development of the embryo, the diffusion of viruses, the utility gained by people as the number of consumption choices increases, and so on.

In the innovation management field the S-Curve illustrates the introduction, growth and maturation of innovations as well as the technological cycles that most industries experience. In the early stages large amounts of money, effort and other resources are expended on the new technology but small performance improvements are observed. Then, as the knowledge about the technology accumulates, progress becomes more rapid. As soon as major technical obstacles are overcome and the innovation reaches a certain adoption level an exponential growth will take place. During this phase relatively small increments of effort and resources will result in large performance gains. Finally, as the technology starts to approach its physical limit, further pushing the performance becomes increasingly difficult, as the figure below shows.



When you plot expertise with respect to time, it traces an S shaped curve. As depicted in the diagram below, when we begin learning a skill, there is a learning curve that means there is a slow progression initially, at the tail of the S curve. As time progresses, learning progresses and develops at an increased pace, helping us to climb the steep slope of the S curve very quickly. At the top of the slope, we are deemed experts in a particular skill. From this point on, even if we put efforts in to improving ourselves further in this area, the resultant learning will not be proportional.



The top end of the S curve is also called the slope of diminishing returns. At this point, many people succumb to the effects of hubris, which gives a false sense of security; they believe that the world believes and acknowledges that they are experts in the field! However, the world keeps turning, and with progress, comes new focus and attention on new skills, rendering the expert obsolete.

So what do we do after we reach the peak of the S curve?

Once answer is that we can create a new S curve. Let's consider the example of mountain climbing, which is similar to learning new skills. Initially, we start at the bottom with a clear estimate and a timeline to climb the mountain. As we become more familiar with the terrain, we are able to climb more efficiently and reach the summit. Once we have reached the top, we cannot stay there for too long,

depending on the environment, altitude, human limitations etc. It becomes clear that a descent is inevitable, but if we are enthusiastic and ambitious, we can set our sights on the next mountain to climb. Similarly, once we reach the top of the S Curve in one particular skill, we should start the S Curve again to obtain the next skill.

Many of us trace multiple S curves in our lives as we learn new skills, but mostly these are incremental or evolutionary transitions. It is harder to make major or revolutionary transitions—ones that involve us moving from one career to a completely different one e.g. a teacher becoming a politician.

S Curve Summary

Overall we can say that the S-Curve is a robust yet flexible framework to analyze the introduction, growth and maturation of innovations and to understand the development cycles.



IMPLEMENTATION TOOLS

Understanding your Audience

How can you assess and persuade your audience? The worksheet in Figure A can be used to clarify the main points of your proposal and assess the audience you are trying to influence and persuade.

Assessing Your Persuasion Skills

Use the tool in Figure B to assess your persuasion abilities.

Worksheet for Audience Assessment

Use this tool to assess an audience that you will need to persuade

Part I: Description of your Proposal and its Benefits

What is the idea or proposition that you plan to communicate to your audience?

What do you hope to persuade your audience to do based on that idea or proposition?

List the benefits of your idea or proposition

Part II: Audience Assessment

1. In the first column, list the names of the people whom you will need to persuade. These individuals will include the following:
 - Decision makers – individuals who approve or reject your idea
 - Stakeholders – people who are affected by acceptance of your proposal
 - Influences – people who have access to the stakeholders and decision makers and can sway their opinions.
2. In the second column, list the benefits that you think each audience member values the most
3. In the third column, note how you would gauge each audience member's receptivity to your idea. Which individuals are hostile, supportive, uninterested, uninformed, or neutral?
4. In the fourth column, list each audience member's preferred decision-making style. For example, which individuals want a lot of factual information before

making a decision? Which ones prefer to analyze other respected individuals' decisions and follow their lead? Which ones tend to feel enthusiastic about new ideas early on but then look for data to support the proposed idea? Which ones, in general, are initially skeptical of others' ideas?

FIGURE A:

Name	Benefits	Receptivity to Your Idea	Decision-Making Style
<i>Decision Makers</i>			
<i>Stakeholders</i>			
<i>Influencers</i>			

Part III: Action Planning

1. In the first column, copy the names of the individuals just as you listed them in Part II.
2. In the second column, note how you plan to win each audience member's mind. That is, what benefits of your idea will you emphasize? What evidence will you provide to reassure your audience that those benefits are within their reach? What words will you use?
3. In the third column, note how you plan to win each audience member's heart. That is, what vivid descriptions, metaphors, analogies and stories might you provide to connect with your listeners on an emotional level?
4. In the fourth column, note how you plan to acknowledge resisters' concerns and communicate your understanding of their concerns.

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Name	Actions to Win Minds	Actions to Win Hearts	Actions to Deal with Resistance
<i>Decision Makers</i>			
<i>Stakeholders</i>			
<i>Influences</i>			

Part IV: Activating Triggers and Audience Self-Persuasion

What persuasion triggers might you set in motion before your presentation? For example, if you think the reciprocity trigger might increase your persuasiveness, what favors or kindnesses might you do for your audience members that would boost the likelihood that they'll support your idea in return?

How might you activate audience self-persuasion during your presentation? For example, what disturbing, leading and rhetorical questions might you pose to encourage listeners to persuade *themselves* of the value of *your* idea?

Worksheet for Persuasion Self-Assessment

Part I: Assessment

Use this tool to assess your persuasion abilities. For each statement below, indicate how accurately the statement describes you. "1" indicates "Not true," "5" indicates "Very true."

Be sure to answer based on your actual behavior in real workplace situations. That way you will have the most accurate assessment of your skills.

Rating

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Statement	Not True					Very True
	1	2	3	4	5	
1. I appropriately establish my qualifications before I try to persuade.	1	2	3	4	5	
2. When persuading, I offer proof of how people have been able to trust me in the past.	1	2	3	4	5	
3. I analyze listeners' words and behavior to assess their decision-making style and receptivity.	1	2	3	4	5	
4. When persuading, I describe the benefits and unique aspects of my idea.	1	2	3	4	5	
5. I use metaphors, analogies and stories in my presentations to highlight my key points.	1	2	3	4	5	
6. I consciously limit the number of points I make in my presentations to no more than three or four.	1	2	3	4	5	
7. I support my arguments with highly credible evidence.	1	2	3	4	5	
8. When I cite facts, data or statistics, I package the information for clarity and memorability.	1	2	3	4	5	
9. I encourage feedback from my listeners to activate audience self-persuasion.	1	2	3	4	5	
10. I use disturbing, leading and rhetorical questions to encourage audience self-persuasion.	1	2	3	4	5	
11. I actively listen to my audience and reflect the content and emotions behind their statements.	1	2	3	4	5	
12. I analyze my audience <i>before</i> persuading to determine my strategy.	1	2	3	4	5	
13. I tailor my persuasion strategy, material and approach to different audiences.	1	2	3	4	5	
14. I vary my choice of media according to the message I want to communicate.	1	2	3	4	5	
15. I consciously help others in an effort to build trust and credibility, knowing that this may result in a relationship in which others want to help me later.	1	2	3	4	5	
16. I try to encourage people to make their commitments to my ideas publicly or on paper.	1	2	3	4	5	
17. I consciously tap the power that comes from titles or positions of authority that I hold.	1	2	3	4	5	
18. When I possess exclusive information, I emphasize its scarcity value to those I am persuading.	1	2	3	4	5	
19. When I promote something, I stress that it is standard practice or part of a popular trend.	1	2	3	4	5	
20. I associate myself with products, people or companies that my audience admires.	1	2	3	4	5	

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21. I emphasize the similarities I share with people I want to persuade.	1	2	3	4	5
22. When I encounter resistance to my ideas, I use paraphrasing and questioning to understand the source of the resistance and to communicate my understanding of the resisters' concerns.	1	2	3	4	5
23. I try to establish positive relationships and feelings with people I want to persuade.	1	2	3	4	5
24. When I anticipate encountering resistance to my ideas, I raise and understand opponents' arguments <i>before</i> presenting my own views.	1	2	3	4	5
25. I use affirmative, assertive speech and win-win language while persuading.	1	2	3	4	5
Score for each column					
Total Score					
(Calculate your score by adding up the numbers in all your responses)					

Part II: Scoring

Use the following table to interpret your score.

104 – 125	Exceptional: You are a talented persuader with a solid understanding of the art and science of persuasion.
78 – 103	Superior: You are a highly effective persuader in many areas but would benefit from refining some of your skills.
51 -77	Adequate: You know and practice many of the basics of persuasion. However, you can increase your success by further extending your skills.
25 - 50	Deficient: You will need to work broadly on your persuasion skills to begin changing or reinforcing others' attitudes, beliefs and behaviors.



AVOIDING PRESENTATION FRIGHT AND COMMON PITFALLS

Twenty Strategies for Reducing Stage Fright

1. Remind yourself that your listeners want you to do well.
2. Believe that you know more about your subject than your audience does.
3. Familiarize yourself with the physical setting of your presentation before you deliver it.
4. Get to know some members of your audience before you speak.
5. Choose a presentation topic you know something about.
6. Prepare thoroughly for delivery of your presentation.
7. Anticipate questions listeners might ask.
8. Memorize the first and last sections of your presentation.
9. Focus on your audience, not yourself.
10. Do not practice in front of a mirror.
11. Never tell the audience you are nervous.
12. View physical symptoms as positive excitement, not negative energy.
13. Talk positively about your presentation to yourself.
14. Turn your nervous energy into something positive.
15. Abandon rigid rules about public speaking.
16. Tell yourself it is okay to make changes and adapt your delivery during your presentation.
17. Remind yourself that if things do not go well, it is not the end of the world.
18. Remember that even very nervous speakers usually appear calm to their audience.
19. Believe compliments on your delivery.
20. Anticipate problems and devise solutions ahead of time.

Avoiding Common Presentation Pitfalls

Instead of...

...Try this Instead

Jumping into facts and figures at the beginning of your delivery

Grab listeners' attention by briefly describing the problem at hand in vivid, compelling terms or offering a gripping anecdote

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Leaving it up to your audience to figure out where your presentation is going	Provide a “road map” – for example, a “table of contents” slide that shows a brief list of the sections of your talk
Relying only on your voice to convey your message	Use effective visuals – diagrams, charts, maps and photos of people – to help make your message memorable
Presenting information-loaded visuals	Ensure that each visual only contains one small point or piece of information
Blocking your visuals or talking to them	Stand to the side so people can see the slides and glance only briefly at each slide before turning to address your audience
Using a bewildering number of visuals	Limit your visuals to only those that reinforce key points in your presentation
Hoping that your audience will take you seriously	Inject some passion into your delivery, by reminding yourself ahead of time that you are telling them something important
Assuming that your audience is engaged	Make eye contact with listeners and watch for fidgeting or other signs of boredom; if you see such signs, stop and ask people what is on their minds, and move in close to selected parts of your audience
Confessing to your audience that you are nervous	Tell them how you feel about the topic you are presenting
Limiting your presentation to describing a problem	Make sure you have potential solutions to offer
Assuming that you do not need to credit your sources	Quote sources accurately and provide proper attribution

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Reading from a script (which bores your audience)	Look up and establish a personal connection with your audience
Hiding behind a podium	Walk around it so your audience can see you and read your body language
Running over the allotted time for your presentation	Ask a trusted colleague in your audience to give you a subtle signal that you have five minutes left, and then one minute left for your presentation
Going off on a tangent with a long anecdote	Make sure all anecdotes have some connection to your main argument
Assuming that you know your audience	Use questions – such as “Does anyone here understand what single-entry accounting is?” – to assess listeners familiarity with your topic and level of knowledge
Grooming yourself subconsciously because you are nervous	Practice keeping your hands below your neck and above your waist



MANAGING CHANGE EFFECTIVELY

Get to know your Employees

The “know factor” Ballot, Figure 1-1, is a practical tool for getting to know the most important things. The first step is to put a check mark in one of the three columns after each item. This will answer the question “Which factors are most important to know?” The next step is to insert the “Very Important” items in the column headings in the form shown in Figure 1-2, “Empathy Worksheet.” In this example, items 1, 4, 5, 6, 7, 11, 15 and 17 were selected.

The third step is to insert the names of subordinates in the spaces under “Name.” The fourth step is to ask the question “Do I know this about the individual?” If the answer is yes, an X should be placed in the appropriate square. If the answer is no, the space should be left blank. An analysis of the completed form will clearly indicate the important factors that are known and those that should be learned. The final step is to learn the important factors that are not known. This can be done by looking at personnel files, asking questions, listening and observing. One way to approach the learning is to set a goal for each month. The goal might be to get to know one or two persons better. Or the goal for a month might be to learn the ambitions and goals of all the employees.

When a change is contemplated or decided on, the form titled “Empathy regarding Change,” Figure 1-3, should be completed. For each person who will be affected by the change, an X should be inserted in the appropriate space. If the reaction is not known, it must be determined. Sometimes the best approach is to ask the individual. At other times, a more indirect approach such as observing, listening or talking to others may be the best approach.

Example

In the Following example, you are asked to use empathy to determine how your subordinates would react to the types of changes described. Suppose that you are the manager in the following situation involving job rotation. Each of your people knows how to do one job in your department. You have decided to rotate jobs so

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they would do a different job each day for three days and then start the cycle again.

How would they react? (Select the answer the best fits your situation).

All of them would welcome the change

Most of them would welcome the change

About half would welcome the change

Most of them would resist the change

All of them would resist the change

Your answer would depend on an individual analysis as described in Figure 1 – 3.

The example of job rotation

Figure 1 - 1 “Know Factor” Ballot

	Very Important	Important	Not Important
1. Name and nickname			
2. Home (where he or she lives; owns or rents)			
3. Status (married or single)			
4. Formal Education (how much, where)			
5. Work experience (where, type of work)			
6. Outside hobbies and activities			
7. Health (disabilities, problems)			
8. Children (names, ages, achievements)			
9. Religion – background and present affiliation			
10. Politics – preference and activities			
11. Attitudes (toward company, boss, union)			
12. Problems outside the plant			
13. Friends at the plant			
14. Financial situation			
15. Ambitions and goals			
16. War experience			
17. Personality (introvert, extrovert)			
18. Intelligence			
19. Birthday			
20. Date of employment			
21. Social and cultural background			

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22. Continuing education (seminars, workshops and so on)			
23.			
24.			
25.			

Figure 1 – 2 “Empathy Worksheet” Sample

NAME	MUST KNOW FACTS							
	Name and Nickname	Education	Experience	Outside Activities	Health	Attitudes	Ambitions and Goals	Personality
Harry Johnston	X	X	X	X		X		X
Thomas Smith	X		X			X		X
Isabella Potts	X	X	X			X		X
Emmett Ward	X							X
Charlotte Green	X	X				X		X
Claire Tooth	X	X		X		X		X

Figure 1 – 3 “Empathy Regarding Change” Form

NAME	R1	R2	N	A	W	?	COMMENTS
Harry Johnston			X				Won't negatively affect him positively or negatively
Thomas Smith					X		Has suggested the change
Isabella Potts						X	Don't know how she will react
Emmett Ward		X					Will probably resent it because he hasn't been consulted
Charlotte Green	X						She will lose some status and security
Claire Tooth				X			She will go along with it

Key: R1 = Resist R2 = Resent N = Neutral A = Accept W = Welcome ? = Not Sure



BRM: EXAMPLE JOB DESCRIPTION AND ADVICE

Business Relationship Manager

A business relationship manager is the connection between the IT department and the business units it services. But this role is more than just being the messenger for each group. Rather, the business relationship manager's primary goal is to ensure that everyone is working at potential and that the most appropriate technologies are being used by the right people. In terms of hierarchy, this position should be at the same level of a divisional director's job and is most effective when the role reports into the CIO or the office of the CIO. Recently, rising demand for internal IT projects and the increased occurrences of failed projects have made this a hot job and have also made finding the qualified candidates difficult.

Business Relationship Manager Skills

Despite years of effort on both sides, there still exists a divide between business units and information technology group. It is that divide that a business relationship manager must work tirelessly to bridge with the end goal of aligning the seemingly endless demands of very disparate groups. The role involves a lot of facilitation such as smoothing the adoption of new technology-based solutions by business users. The relationship manager also keeps everyone, as the cliché goes, on the same page so that no one goes without having access to and updates of a company's core information. In a sense, they are the guardians and champions of methodology and adherence to those methodologies.

A technology related BS or MS, possibly an MBA. The bottom line: a combination of strong technology skills and business acumen. In terms of IT background, it really depends on the specific technologies an organization is using. For instance, a company that uses a lot of SAP software will likely choose former SAP staff as its business relationship managers. Not only are they experts in SAP, they also have experience dealing with the applications vendor and its partners.

How to Find A Business Relationship Manager

The best candidates for your company are likely to come from those already familiar with the technology your company uses. As such, connecting with communities that already congregate around your core technologies can, as a side benefit, put you in touch with the right professionals. Don't limit your search and be sure to look at professional organizations, consultancies, vendors, their partners and user groups. Also consider those that have participated in internal task forces and committees as they too may have the qualities that make for a good business relationship manager. If at first you don't succeed don't be discouraged.

In terms of skills, being a people-person is critical as is being able to lead. The best candidate will also have a solid understanding of the day-to-day execution of business and the IT tasks. When interviewing, look for answers that include different possible paths to a solution. Thinking out of the box and being able to consider alternatives will go a long way in solving the myriad of problems companies of significant size must routinely tackle.

If there's a desire to use an existing employee, be aware that teaching leadership and people skills can be quite difficult. However, it's possible to develop business relationship managers internally by first looking at people with an interest in technology and who either have undergraduate business degrees or have acquired business-related skills from working in financial roles. Ease internal candidates into the business relationship manager role by bringing them in on a project basis. Those that adapt quickly are the ones you should continue to evaluate for future work.

Salary Range - \$140,000 to \$220,000

Always take salary ranges with a grain of salt. Aside from often being very wide, there are often mitigating factors that can push an individual's salary below or above the range. A lot will depend on the hiring company as well as with your abilities to negotiate.

BUSINESS RELATIONSHIPMENT MANAGEMENT RESPONSIBILITIES

Responsible for (Fulfills the task independently):

- Pre-project business solution design;
- Has relationship with internal technology teams;
- Has relationship with external technology vendors;
- Identifies opportunities for operational efficiency;
- Service Level Agreement (SLA) negotiations; and
- Directs projects towards desired technology strategies.

Accountable (Fulfills the task by coordinating others efforts):

- Overall solution delivery (project progress);
- Project issue resolution;
- Develop long-range technology strategies; and
- Provides initial project estimates for cost-benefit analysis.

Consultant (Advises on the task):

- Participates in technology aspects of business-sponsored RFX's;
- Evaluate project objectives;
- Project prioritization; and
- New business initiative analysis.

Informed (Is advised on the task):

- Gains understanding of business strategies;
- Gathers information on competitor technology;
- Stays abreast of industry trends in the business and technology;
- Has relationship with research firms; and
- Involved with advanced or emerging technology groups within your IT organization.

Key Role Interactions

Business Partners

The BRM works with the business at several organizational levels. The BRM will work with business area teams to understand project requirements, shape the initial project request, and provide a high-level estimate of the project effort and costs used in cost-benefit analysis. The BRM will regularly report back to business managers on the status of projects.

Application Architects

Early in the process, the BRM works with the architects to discuss potential solutions that match the business strategy with the technology strategy. The architects will also provide consulting on additional costs due to additional equipment or increased capacity requirements.

Project Managers

Early in the process, the BRM works with the PM's to discuss staffing needs, high-level timelines, and the associated cost. Throughout a project, the BRM will stay informed on the project status in order to provide business managers with regular status. Occasionally during the project, the BRM will be used in a facilitation role when an impasse between the technology team and the business team occurs.

Personal Skills

The BRM needs to have subject matter expertise in both the business and technology. As such, it is not possible for the BRM position to be an entry-level position. Rather, this position requires the ability to understand the business sufficiently to communicate the importance of projects to the technology teams, as well as to understand the technology sufficiently to communicate the complexity in simple terms for the business.

"Additionally, attention to detail and good analytic skills are important because there are always a lot of interdependencies, and even a simple change could affect other applications or parts of the infrastructure.

Interpersonal Skills

The BRM aligns IT and business with these key skills:

- Communication;
- Presentation;
- Critical Thinking; and
- Collaboration.



BRM METRICS AND REPORTS

Metrics and Reports

Example metrics and reports linked to the requirements in BRM are given below in Table 1. This list is not intended to be comprehensive but illustrates the type of information that is generally beneficial for effective management of services. Many of the metrics and reports are partly text and the list has not been limited to reports such as those produced by the service level management process on actual service levels and workloads.

Many metrics and reports can only be produced by the integration of processes. E.g. by passing information between the PDCA cycle and a service management processes (such as Service Level Management, Business Relationship Management and IT Budgeting and Accounting). For this reason, some metrics could be shown against more than one clause in TABLE 1, but are only produced once.

Note, as BRM is an ITSM process the references to the ‘customer’, refer to the business organization – supported by IT.

Table 1

Type	Purpose
Management responsibilities	
Number/percentage of staff attending communication sessions	Management shall: b) communicate the importance of meeting the service management objectives and the need for continual improvement;
Staff survey results on quality of management communications	
Customer satisfaction on meeting of customer requirements	c) ensure that customer requirements are determined and are met with the aim of improving customer satisfaction;

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Actual vs. planned headcount and costs	e) determine and provide resources to plan, implement, monitor, review and improve service delivery and management e.g. recruit appropriate staff, manage staff turnover;
Percentage of posts vacant, supported by reasons for unfilled posts.	
Staff turnover rates	
Review of management processes, especially the effectiveness role of senior responsible owner and processes owners	g) conduct reviews of service management, at planned intervals, to ensure continuing suitability, adequacy and effectiveness

Type	Purpose
Documentation Requirements	
Business/customer sign-off requirements, specifications, service level agreements and service management plan	Service providers shall provide documents and records to ensure effective planning
Number or percentage of services and systems adequately documented, including user manuals, operations documents and training materials.	Service providers shall provide documents and records to ensure effective operation of service management
Cost of producing and maintaining user documentation, operational documentation and training materials.	
Number of documented policies	documents and records shall include a) documented service management policies and plans;
Project/program management reports	
Percentage of processes documented with correct cross-references between policy, process and procedure	c) documented processes and procedures required by this standard;

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Report on changes to a document library, such as new, changed and deleted documents	Quality of document management
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Type	Purpose
Competence, Awareness and Training	
Report on the percentage of roles and responsibilities defined, current and correct	All service management roles and responsibilities shall be defined and maintained together with the competencies required to execute them effectively
Review results quantified as the percentage that meet requirements	Staff competencies and training needs shall be reviewed and managed to enable staff to perform their role effectively
Quality and effectiveness of senior management communications, e.g. from staff surveys etc	Top management shall ensure that its employees are aware of the relevance and importance of their activities and how they contribute to the achievement of the service management objectives
Frequency of communications on service management from the senior responsible owner or process owner.	Top management shall ensure that its employees are aware of the relevance and importance of their activities and how they contribute to the achievement of the service management objectives.

Type	Purpose
Report on the number of percentage of SLA's agreed and in draft status	Each service provided shall be defined, agreed and documented in one or more SLA's

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Status of supporting agreements	Agreement of supporting arrangements
Change management reports on changes to SLA's	The SLA shall be under the control of the change management process
Report on review of SLA's with any supporting action plans	Management control for non-conformance shall be reported and reviewed.

Type	Purpose
Service Reporting	
All SLA actual against targets	Service reporting shall include: a) performance against service level targets;
Gap analysis reports	b) non-compliance and issues, e.g. against the SLA, security breach;
Workload volumes reports or exception reports when volumes vary	c) workload characteristics e.g. volume, resource utilization
Resource utilization compared to planned or projected utilization	
Customer satisfaction survey reports	f) Satisfaction analysis
Number and types of complaints	
Action plans included in service reports	Management decisions and corrective actions shall take into consideration the findings in the service reports and...
Management communications on significant	shall be communicated to relevant parties

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events, changes or plans	
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Type	Purpose
Business Relationship management	
Reports on changes to stakeholder and customer groups	The service provider shall identify and document the stakeholders and customers of the service
Report on the review of scope, SLA's etc, possibly as minutes and action plans	Service reviews
Reports on performance, achievements, workloads, issue logs for the review	
Report on the outcome of the review, possibly as minutes and action plans	
SLA and contract change details	Management of changes to contracts if present, and SLA
Report on complaints and remedial action	Management of complaints
Satisfaction reports, with action plans	Process improvements based on customer satisfaction

Metric Documentation

Reference
A code should be used so that each metric can be references unambiguously and controlled more easily. It may be useful to use a coding system that groups metrics of a similar type, i.e. by policy, process or procedure. The coding system may also be designed to reflect the hierarchical relationship between metrics.
Name
This will simplify discussions during the design and production of metrics with the target audience.
Audience
This is best kept at role/function/department/organizational level. The use of the names of individual people raises complications for the currency of the data and should be avoided.
Objective/purpose of metric
The reason for the metric being produced should be briefly defined. This will help during the PDCA review of metrics.
Links/cross references
Recording a link between the metric, the relevant policy/process/procedure, and the service catalogue entry to which it relates will help define the objective/purpose of the metric.
Process interfaces
Metrics may be used to manage the interface between processes. Some metrics are based on data from one or more processes, in which case the documentation should link the metric to all the associated processes.
Algorithms
The calculation of metrics should be unambiguous. The algorithm should be published in an accessible glossary, or if there is any risk of the metric being misinterpreted the algorithm should actually be published with the metric.
Data sources

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Where data is taken from a monitoring or logging system it is advisable to include the field names and a description of the data in each field used and not just the name of the system from which the data is retrieved. This will be used to ensure there is an understanding and continuity in the metric.

Target control limits, trend or benchmark value

A target, such as '95per cent fix time in eight hours', is common for service reports for SLA's. There may not be a target for the service provider's own internal reports, but the service provider may choose to build in control limits, trends or an established industry benchmark. Whatever is used, this should be documented so that it is used consistently. It should also be noted if a metric is only triggered for issue when the actual value is outside agreed limits.

Common pitfall in metric production

Pitfalls	Effects	Solutions
Internal diagnostic metrics are presented as performance metrics for the customer.	The customer can not relate to the information provided by the metrics, so they disregard the reports.	Metrics that are useful only for internal purposes should not be sent to customers. Service providers should meet with customers to find out what they are interested in and how they would use data that meets their needs.
There are so many metrics that are irrelevant details mask the important content.	The reports neither are not considered useful, they cost too much to produce and provide very little value to the customer.	A few key metrics are better, only those that are of real importance to the customer or to the service provider should be produced, and a clear distinction should be made between the two.
The same metrics are reported for many years, without consideration being given to new information needs and changing priorities.	The metrics do not reflect current information needs and so are not read and therefore not used.	The metrics and reports should be reviewed and redesigned to meet the needs of the target audience - in extreme cases; the reports should not be

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		produced at all.
The metrics have no logical relationship to each other, but have been produced by different people at different times.	The information in the reports is confused and therefore not easy to understand.	The reports should be reviewed to give structure and logic to how the metrics are presented – this may well lead to changes in what is reported and will lead to changes in what is reported and will lead to more benefits.
The data is not sufficiently accurate for the metric to be reliable for the management of the service.	The information provided does not act as firm foundation for actions or management planning. The accuracy of the data is not reliable leading to the wrong conclusions being drawn and the wrong actions taken as a result.	The metrics should be improved in accuracy, or if that is not possible, they should not be issued. If they are issued, they should be accompanied by a warning about the scale of likely errors in the data. The precision with which metrics are reported should also be set so that it does not imply a greater level of accuracy than is justified.
The cost of monitoring and metric production outweighs the benefit of the information provided.	There is a waste of time and money in monitoring and reporting very precise metrics, without an improvement in decision making.	The precision required should be considered so that the accuracy is fit for the purpose. A solution like this will require an understanding of how the metrics are used and how the data is obtained.
Metrics generate bad practices among those who are concerned that ‘the numbers’ do not reflect well on their personal	Ill chosen metrics can damage effectiveness as much as well chosen metrics and targets create improvements	Alternative metrics should be selected to encourage the desired practices. Alternatively, the metrics should be supplemented to

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performance.		give a wider picture of performance.
Individual teams duplicate effort on measurement and reporting activities	Wasted effort, conflicts and increased cost of metric production is likely.	The process owner should ensure that the reporting process is streamlined so that duplication is avoided. This may well require centralized control by a senior manager if the individual members of staff are reluctant to give up producing 'their metrics'.
Metrics that are unrelated to the customer's interests are included in the customer report because nothing else was available at the time it was produced	Reports will be irrelevant and customers may see it as an illustration of how little the service provider understands the customer's interests and concerns. At best the report will be ignored, and it may be the subject of complaints	Discuss reporting requirements with the customer, noting how the customer describes the service themselves, and in what terms they express concerns or requests for new or changed services. Propose new metrics that reflect those interests, then refine the proposed metrics that they meet the requirements of the customers
Metrics are manually produced and/or very complex to calculate	Production is error prone; the results are unreliable leading to inappropriate actions being taken.	Metrics should either be dropped or the production should be automated. If neither option is available, a simpler method of reporting the data should be sought, but with possible risks from errors in the data identified in the report.
Many metrics and reports are	Production costs are large	Discuss the issue with each

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based on small variations, so that a large number of different reports provide similar or the same information.	and the information may be confusing for the service provider	group receiving metrics and seek a compromise on a standard metric or report.
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