

## WA16: Self-Management, Supervision, Management and Leadership

### 5.2 Exercise management in unpredictable situations and develop evaluation criteria in order to review and develop performance of others

- LO149: Demonstrate ability to exercise management and supervision in activities where there is unpredictable change.
- LO150: Demonstrate ability to agree team performance targets to contribute to meeting strategic objectives, mentor and coach teams to reach their targets, and evaluate performance
- LO151: Demonstrate ability to formulate and evaluate criteria for work of others in order to review and develop performance of others



# Module Details



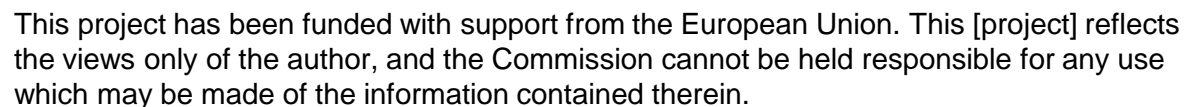
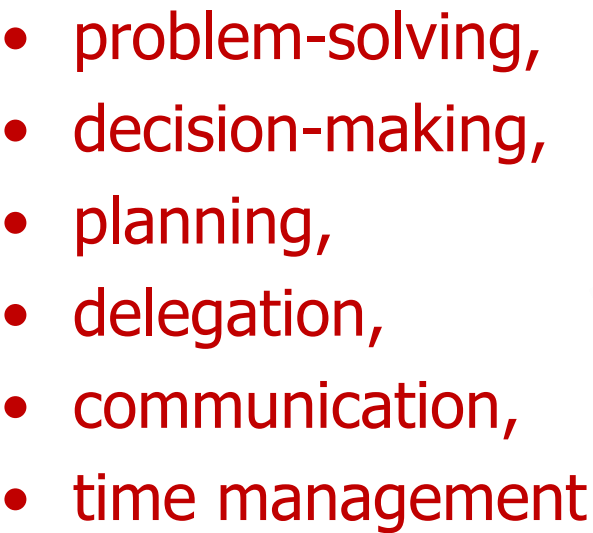
<b>Work Area Code:</b>	16
<b>Work area title:</b>	Self-Management, Supervision, Management and Leadership
<b>Unit Code:</b>	5.2
<b>Unit Title:</b>	Exercise management in unpredictable situations and develop evaluation criteria in order to review and develop performance of others
<b>Learning Outcomes Ids:</b>	LO149, LO150, LO151
<b>Learning Outcomes titles:</b>	LO149: Demonstrate ability to exercise management and supervision in activities where there is unpredictable change. LO150: Demonstrate ability to agree team performance targets to contribute to meeting strategic objectives, mentor and coach teams to reach their targets, and evaluate performance LO151: Demonstrate ability to formulate and evaluate criteria for work of others in order to review and develop performance of others
<b>Recommended Duration:</b>	4 hours
<b>Trainer:</b>	



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# EUROPEAN PERSONAL ASSISTANT | LEVEL 5



- management is about organization
- focus on the technical “how” of accomplishing tasks.
- The critical role of a manager is to ensure that a company’s many moving parts are all working properly together.



# One step at a time: Plan

## Levels of planning:

- Strategic Planning
- Tactical Planning
- Operational Planning

## Kinds of planning:

- Disaster Planning
- Succession Planning
- Crisis Planning
- Compensation Planning





# One step at a time: Organise



- determine the roles,
- assign tasks to the roles,
- determine the best resource (people or equipment) for the role,
- obtain the resources and allocate them to the roles,
- assign resources to the roles and *delegate* authority and responsibility to them.



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# One step at a time: Direct



- Time for some *action*
- direct your team to get the work done.
- make sure:
- the goal is clear to everyone on the team.
- Their role is clear
- They have the necessary resources



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# One step at a time: Pull, don't push



- Lead (pull)
- Don't give orders (push)
- Motivate people



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# One step at a time: some tools

- Scheduling tools: Trello, google calendar, outlook
- Control the budget!
- make sure all the people in your team are performing as planned.
- If not, find and fix the cause.



# Business disciplines: Motivation



*"The role of leaders is not to get other people to follow them but to empower others to lead." -Bill George*



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# Business disciplines: Motivation



1. Act as a role model
2. define clearly the vision, mission, strategy, goals and objectives of each employee.
3. Make sure everyone on your team understands their key roles
4. Empower your employees to succeed and delegate challenging and meaningful work
5. Work with each employee to create their own personal development plan.
6. Monitor the progress of your employees towards accomplishing their goals and objectives



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# Business disciplines: Delegation

Delegating means letting others become the experts and hence the best.

(Timothy Firnstahl)

izquotes.com



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# Business disciplines: Delegation



delegation and SMART, or SMARTER

- Delegated tasks must be:

**S**pecific

**M**easurable

**A**greed

**R**ealistic

**T**imebound

**E**thical

**R**ecorded



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# Business disciplines: Delegation, step-by-step



1. Define the task
2. Select the individual or team
3. Assess ability and training needs
4. Explain the reasons
5. State required results
6. Consider resources required
7. Agree deadlines
8. Support and communicate
9. Feedback on results



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# Business disciplines: Feedback

“  
**We all need people  
who will give us  
feedback.  
That's how we improve**  
Bill Gates, Microsoft



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# Business disciplines: Feedback



- one of the most powerful tools in the manager's toolkit
  - Positive feedback: identifying and reinforcing the behaviors that promote high performance.
  - Constructive/negative feedback: identifying and promoting change in behaviors that detract from high performance.
- Effective feedback: specific to the behavior (either negative or positive) and delivered as quickly as possible.



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# Business disciplines: Feedback, step-by-step



1. **Get your emotions under control.** Don't do it if you're still angry
2. **Deliver negative feedback personally and confidentially.**
3. **Focus on the behavior, not the person.**
4. **Be specific.**
5. **Be timely:** As soon as possible after the event.



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# Business disciplines: Feedback, step-by-step



6. Remain calm.
7. Reaffirm your faith in the person.
8. Stop talking and invite the other party to engage.
9. Define and agree on a mutually acceptable action plan.
10. Establish a time to follow-up.



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- Were you ever in a situation you had to provide negative feedback to a colleague?
- How did it go?
- Was it easy?
- What were the results?

## Group discussion



# Dealing with unpredictable change



*Uncertainty and change are the only predictable factors for businesses in a world where once-stable regimes fall within weeks, and supposedly strong organisations and economies collapse unexpectedly. You cannot predict the future but you can prepare for it.*

*-Mercury Urval*



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# Dealing with unpredictable change



- Constantly analyse the setting for threats and opportunities
- View the trends, identify indicators of change
- Consider the possibilities
- Outline the best and worst scenarios
- Assess the probabilities of particular scenarios
- Prepare *contingency plans* to meet the scenarios with higher probabilities
- Maintain the necessary resources to meet contingency plans
- Identify the indicators that would initiate particular scenarios
- Decide which indicators might call for immediate action
- Be prepared to act quickly



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# How to solve a problem

There are four basic steps in solving a problem:

- Defining the problem.
- Generating alternatives.
- Evaluating and selecting alternatives.
- Implementing solutions.





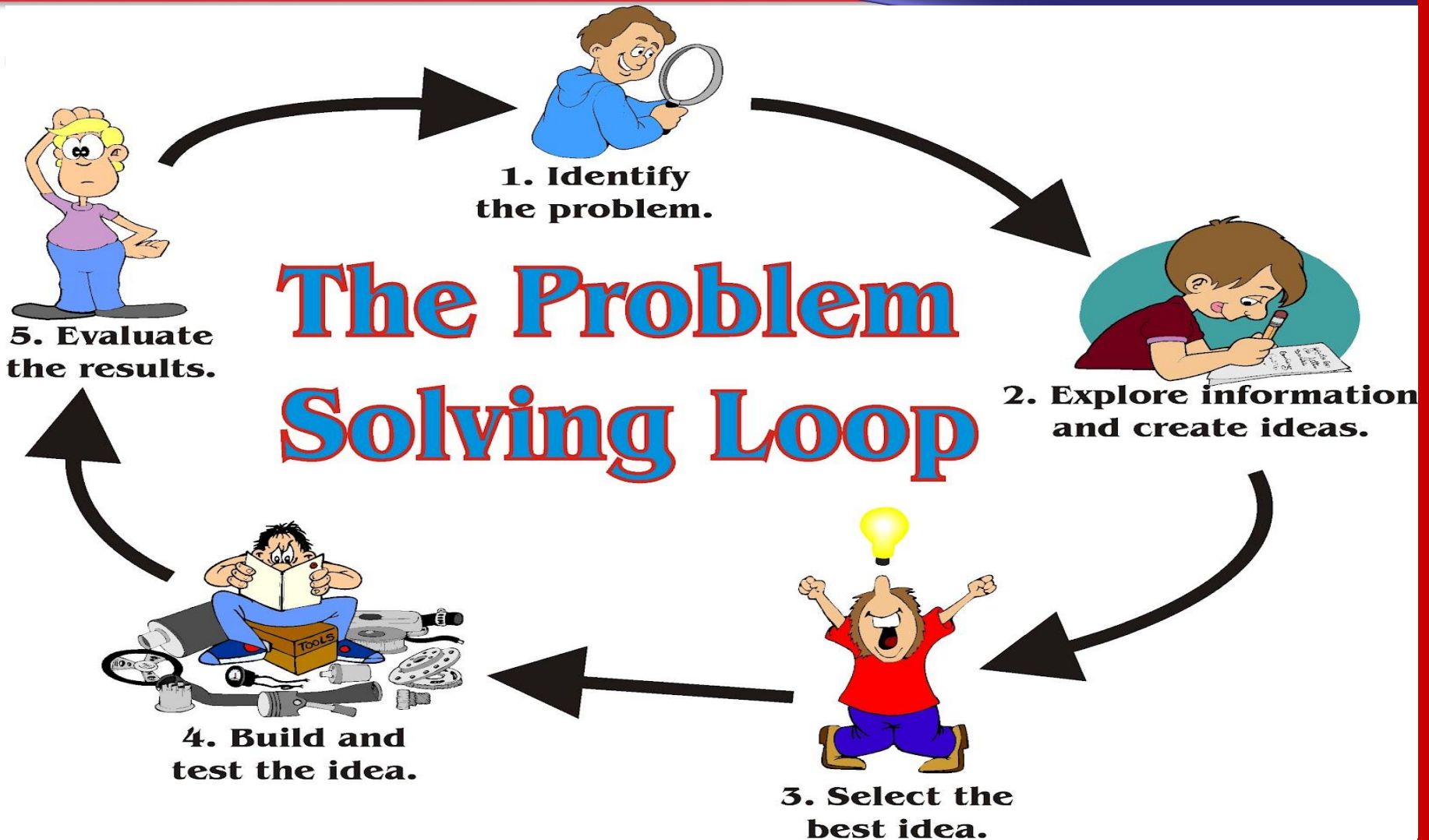
- 1. Data Driven**
- 2. Tapped Knowledge**
- 3. Situation Driven**



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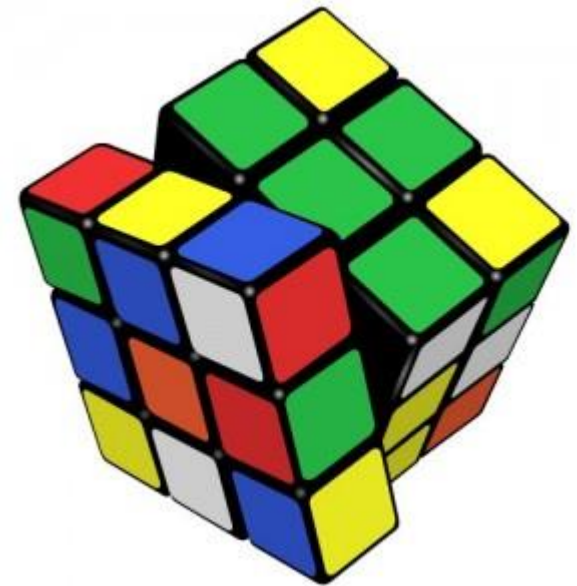
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## 1. Is there a solution?

- There always is a solution
- The first step is to believe this before trying to identify it!



## 2. Write it down

- Write everything down
- Everything meaning all aspects of the situation
- Think of a detective solving a crime!



## 3. Find the cause

- What caused this to happen?



## 4. Identify possible solutions

- There usually are more than one solutions
- Only if you successfully identify the root cause, you will be able to find the right remedy





## 5. Deadlines

- TAKE ACTION
- Set a rigid deadline to solve the problem!

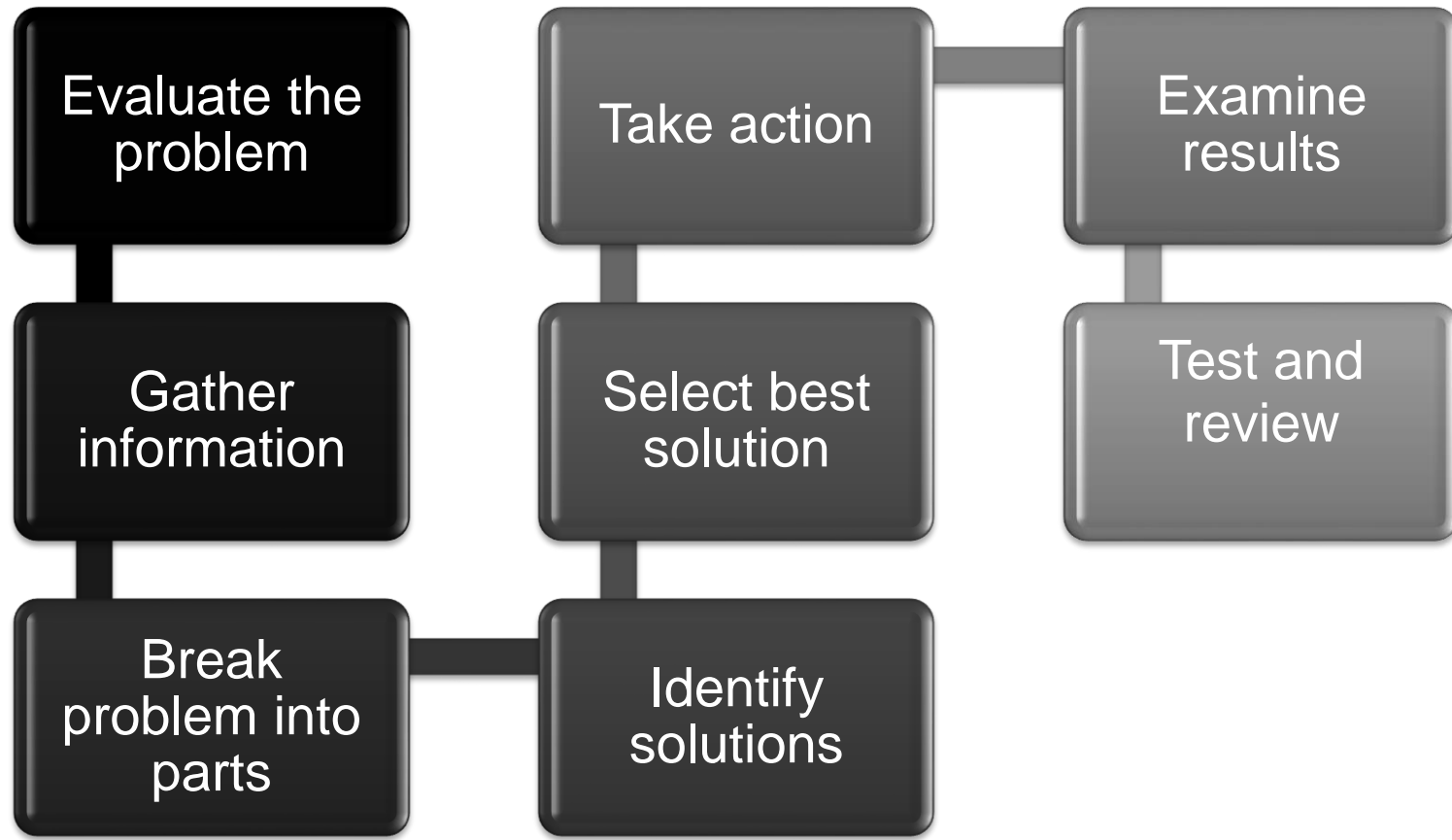


## 6. Evaluate the solution

- Was it effective?
- Learn from successes and failures!



# Systematic problem solving



# Methodological tool

Solve the problem!  
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"Ordinary people with commitment can make  
an extraordinary impact on their world."  
- John C. Maxwell



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# Importance of commitment



- Committed people are effective in influencing others
  - Can you persuade someone to buy something if you believe it's useless?
- Committed people don't give up easily
- People cooperate at a higher level when they share commitment
- If people are committed to an effort for a period of time, they will learn what they need to know to be more effective



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- Committed team members positively influence less committed ones
- Commitment is a CHOICE
- Commitment Lasts When it is Based on Values
- For improving commitment you need to:
  - Evaluate the commitment and performance of individual team members



# Measuring performance, Balanced Scorecard



# Measuring performance, Balanced Scorecard



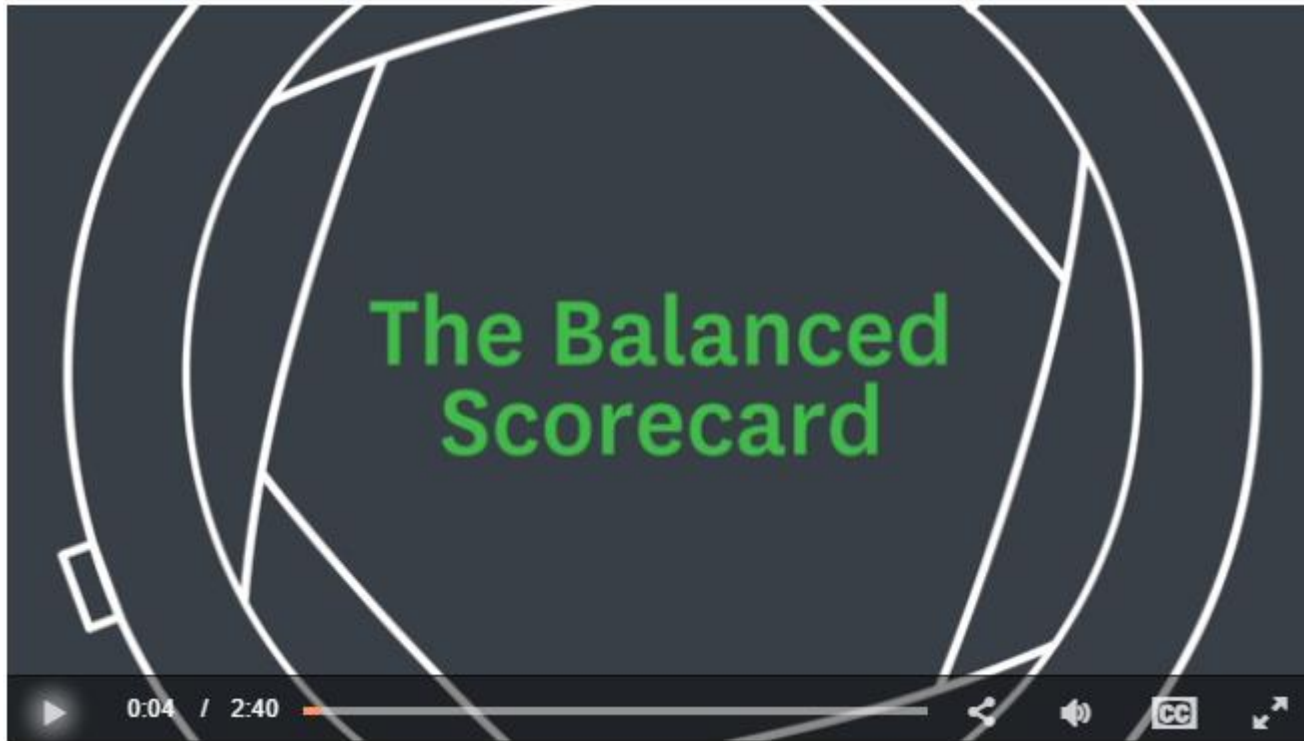
- According to the Balanced Scorecard Institute, the balanced scorecard (BSC) is a management system that organizations use to:
  - Communicate what they are trying to accomplish
  - Align the day-to-day work that everyone is doing with strategy
  - Prioritize projects, products, and services
  - Measure and monitor progress towards strategic targets



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## VIDEO: HBR

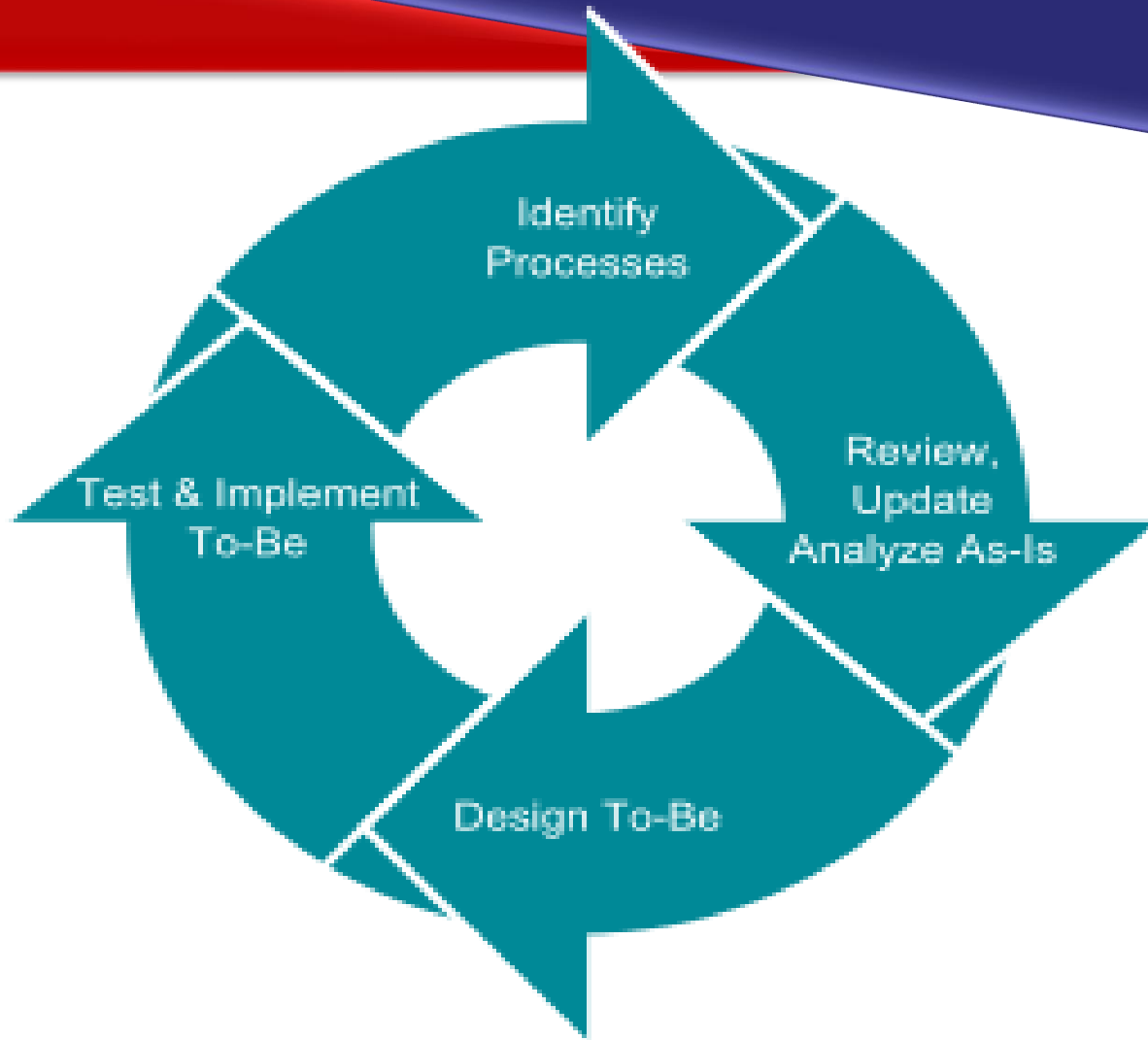


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# Business Process Re-engineering



Business Process Reengineering Cycle



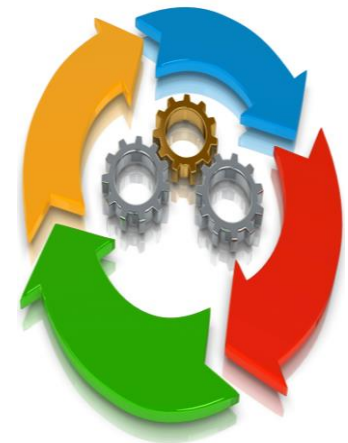
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Business Process Reengineering is a dramatic change initiative that contains five major steps. Managers should:

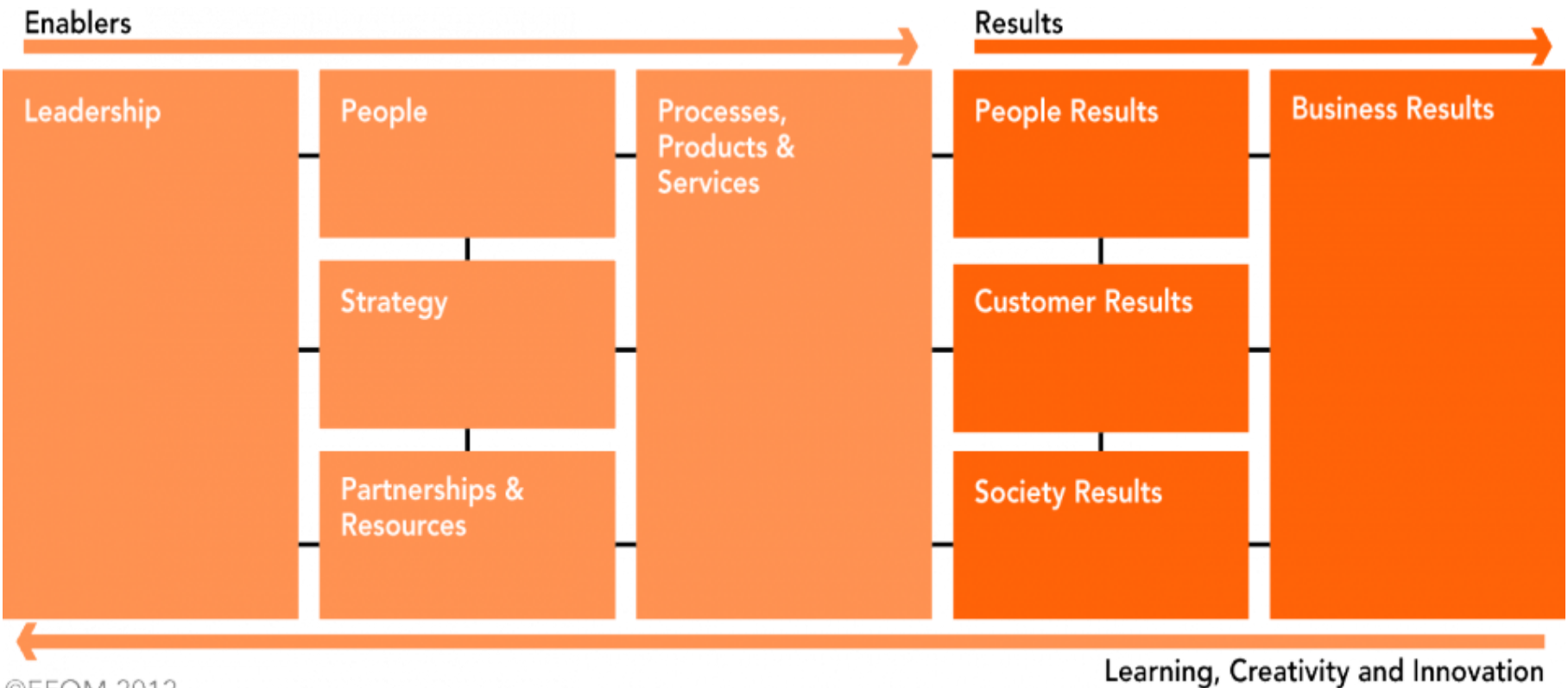
- Refocus company values on customer needs
- Redesign core processes, often using information technology to enable improvements
- Reorganize a business into cross-functional teams with end-to-end responsibility for a process
- Rethink basic organizational and people issues
- Improve business processes across the organization



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# EFQM Excellence Model



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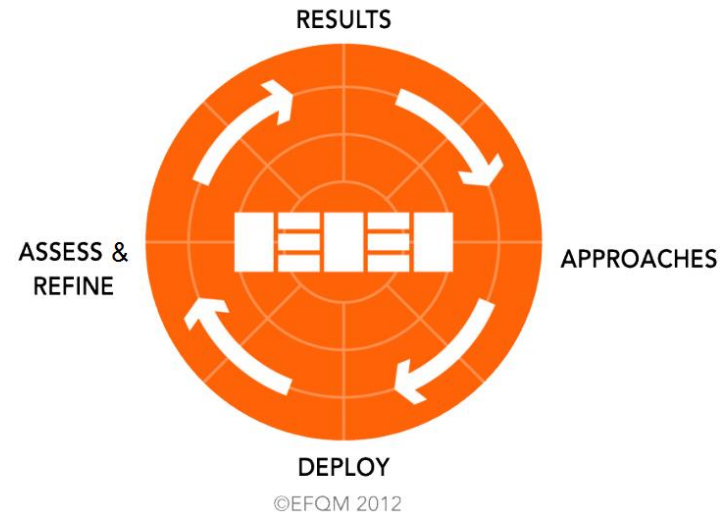


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The **EFQM Excellence Model** is a non-prescriptive business excellence framework for organizational management promoted by European Foundation for Quality Management (EFQM) and designed for helping organizations to become more competitive.



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The model consists of 3 components:

- Eight core values or key management principles that drive sustainable success
- Nine criteria, separated into 5 'Enablers' and 4 'Results'
- RADAR logic, continuous improvement cycle used by EFQM. It was originally derived from the PDCA cycle.



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- Eight core values or key management principles that drive sustainable success:
  - Adding Value for Customers
  - Creating a Sustainable Future
  - Developing Organisational Capability
  - Harnessing Creativity & Innovation
  - Leading with Vision, Inspiration & Integrity
  - Managing with Agility
  - Succeeding through the Talent of People
  - Sustaining Outstanding Results



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- Nine criteria, separated into 5 'Enablers':
  - leadership,
  - people,
  - strategy,
  - partnerships & resources,
  - processes, products & services
- and 4 'Results'
  - people,
  - customer,
  - society,
  - business results



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- **RADAR logic, continuous improvement cycle used by EFQM.**
  - Determine the **R**esults aimed at as part of the strategy
  - Plan and develop a set of **A**pproaches to deliver the required results now and in the future
  - **D**eploy the approaches in a systematic way to ensure implementation
  - **A**ssess and **R**efine the deployed approaches based on monitoring and analysis of the results achieved and ongoing learning



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# continuous improvement



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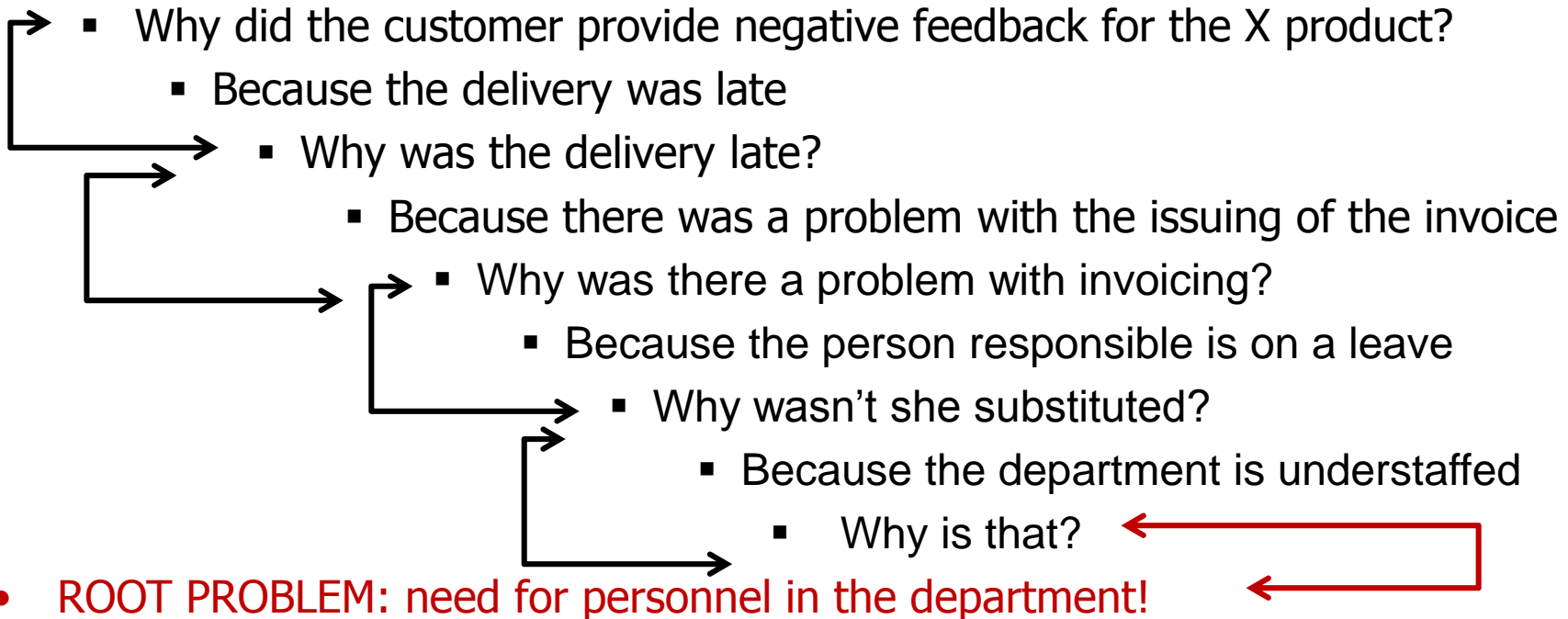
- The cycle of kaizen activity can be defined as: "Plan → Do → Check → Act"
- Another technique used in conjunction with PDCA is the 5 Whys, which is a form of root cause analysis in which the user asks a series of five "why" questions about a failure that has occurred, basing each subsequent question on the answer to the previous







- Example of 5 why's:



6σ



## Six Sigma follows DMAIC methodology:

- **Define** the system
- **Measure** key aspects of the current process and collect relevant data; calculate the 'as-is' Process Capability.
- **Analyze** the data to investigate and verify cause-and-effect relationships.
- **Improve** or optimize the current process based upon data analysis using various techniques. Set up pilot runs to establish process capability.
- **Control** the future state process to ensure that any deviations from the target are corrected before they result in defects.



# Measuring performance and setting targets: WHAT



## First thing's first: Decide **WHAT** to measure:

- Focus on key business drivers
- Find your specific measures
  - E.g. customer service
- Use standardised measures
- Choose and use key performance indicators (KPIs)



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## Key criteria when selecting KPIs:

- they should be as closely linked as possible to the top-level goals for your business.
- KPIs need to be quantifiable.
- KPIs should relate to aspects of the business environment over which you have some control.



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# Measuring team members' performance



## Key Processes:

- Meetings and appraisals
- Quantitative measurement
  - Sales per employee
  - Contribution per employee
  - Profit per employee



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## GOALS:

- To identify the desired performance levels of the team
- To identify how these performance levels will be achieved
- To provide guidance and direction the team
- To measure progress towards the desired performance levels







Team Performance Plans usually include the following information:

- Goals for team development
- Performance measures
- Actions required to achieve goals
- How long goals will take to achieve



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# Methodological tool

Develop a performance improvement plan!

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# Benefits of delegation on team performance and goals



- ***Save Time***
- ***Achieve More***
- ***Increase Your Value***
- ***Development***
- ***Self-esteem***
- ***Job Enhancement***
- ***Efficiency***
- ***Flexibility***
- ***Teamwork***
- ***Balanced Workloads***
- ***Aid Communication***
- ***Retain Good Team Members***

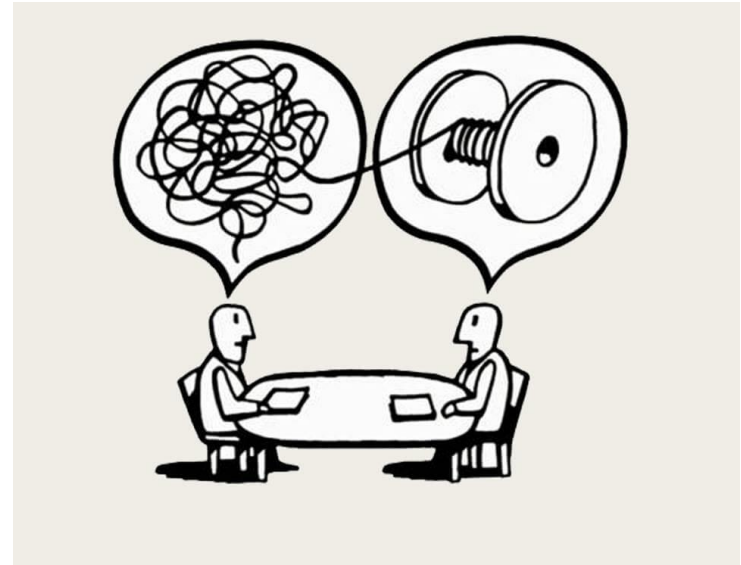


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## Mentoring vs. coaching differences:

- Coaching is task oriented - Mentoring is relationship oriented.
- Coaching is short term - Mentoring is long term.
- Coaching is performance driven - Mentoring is development driven.
- Coaching does not require design - Mentoring requires a design phase



## When is coaching appropriate:

- When you are seeking to develop its employees in specific competencies
- When you have a number of talented employees who are not meeting expectations
- When your organisation is introducing a new system or program
- When your organisation has a small group of individuals (5-8) in need of increased competency in specific areas
- When a team member needs assistance in acquiring a new skill as an additional responsibility



# Mentoring and coaching team members



## When is mentoring appropriate:

- When you are seeking to develop the organisation's talent pool as part of succession planning
- When you seek to develop the organisation's diverse employees to remove barriers that hinder their success
- When an organisation seeks to more completely develop its employees in ways that are **additional** to the acquisition of specific skills/competencies
- When an organisation seeks to retain its internal expertise and experience
- When an organisation wants to create a workforce that balances the professional and the personal



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# Mentoring and coaching team members



"A mentor is someone who sees more talent and ability within you, than you see in yourself, and helps bring it out of you."

Bob Proctor



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# Process of evaluating work of others



- A supervisor is responsible for evaluating a team member's performance.
- The outcome of the evaluation process is recorded along with justification,
- It is presented to the employee.
- In case the team member does not agree, he/she should be able to enter his or her own view and the reasons for it
- **An action plan will be mutually decided based on the outcome**



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# Possible evaluation criteria, 1: Vocational competence



## DOES HE/SHE DEMONSTRATE/HOLD:

- An overall command of the duties, knowledge, skills, methods and tools as described in the job description?
- The required vocational skills?
- Appropriate responds to new challenges and ideas, and views new duties and practices?
- An active role in improving the job?
- Improvement of personal skills?
- Skills exceeding the employee's own basic duties that benefit the workplace, or some special ability or expertise?



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# Possible evaluation criteria, 2: Responsibility at work and activity in the workplace



## DOES HE/SHE DEMONSTRATE/HOLD:

- *Spontaneity. Factors:*
  - how spontaneous the employee is in his/her work
  - how the employee takes the initiative in improving working methods and the work-place
- *TEAMWORK. Factors:*
  - how the employee co-operates at the workplace, and with external parties and stake-holders
  - how the employee promotes community and a positive atmosphere
  - how the employee deals with conflict



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# Possible evaluation criteria, 2: Responsibility at work and activity in the workplace



## DOES HE/SHE DEMONSTRATE/HOLD:

- *Commitment to work and colleagues/co-workers. Factors:*
  - how the employee participates in improving the workplace
  - how the employee adheres to mutually agreed practices
  - how the employee is committed to duties and to the aims of the employee's workplace
  - the extent of the employee's involvement in discharging community functions.



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# Possible evaluation criteria, 3: Quality and performance



## DOES HE/SHE DEMONSTRATE/HOLD:

- *Productivity. Factors:*
  - achievement of objectives or deadlines
- *Quality of work. Factors:*
  - quality of work in relation to the demands and goals of duties
- *Economy. Factors:*
  - overall economy in discharging duties
  - Use of resources



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# Methodological tool

Decide the evaluation criteria!

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- Review Question 1
  - Can you name the main steps when providing negative feedback?
- Review Question 2
  - Can you list the main differences between coaching and mentoring?
- Review Question 3
  - What do we have to consider when designing KPIs?
- Review Question 4
  - Name 3 criteria categories for evaluating work of others



- **Management skills**
  - problem-solving,
  - decision-making,
  - planning,
  - delegation,
  - communication,
  - time management
- **Importance of:**
  - Motivation
  - Delegation
  - Feedback
- **Differences of Mentoring vs. coaching**





# Well Done!

## You have completed this unit



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