



Practical Aid Memoirs for the workplace

PAM 1

‘Communication’



‘Establish and maintain the team’

3rd Edition

Communication Training Improvement



'Happiness is neither virtue nor pleasure, nor this thing nor that but simply growth

We are happy when we are growing! WB Yeats



Forward

The motivation to write a series of **Practical Aide Memoirs, PAMs** was taken after witnessing and experiencing the absence of some assistance at work to help jog the memory or provide some guidance. Sometimes people just need a reminder, a nudge to get them along the way again. The PAMs provide sufficient information to allow the reader to easily digest the content and put it into practice at the workplace.

Essentially, Practical Aide Memoirs are just that, practical. The PAMs are intended as a reference to assist with planning, decision making and action. The resultant action is intended to improve the workplace performance of individuals and teams, lifting those Key Performance Indicators, sustainably. The PAMs are about creating an environment of success.

PAM 1 'Communication' is about laying the foundations. PAM 1 starts with the individual, then places the individual within and around the team. The team function is examined, and we look at motivation. PAM 1 also makes clear the distinction between leaders, managers and roles. Throughout PAM 1 there is an emphasis on communication skills, an orientation towards objectives and outcomes, and reflective practice.

PAM 2 'Training' puts the framework in place. The PAM establishes and maintains the learning environment and sets in place a culture of personal and professional development. **PAM 3 'Improvements'** builds on PAMs 1 and 2 and is all about creating an environment of Continuous Improvement. While based on sound Lean and Projects principles, this PAM remains practical due to the principle of being 'applied'; easy to grasp and transferable into the workplace.

PAM 4 'Logistics' provides a practical guide to logistics. The PAM has been put together to act as a springboard to a review of logistics and planning for the optimisation of operations. There is a degree of overlap in the PAM to facilitate the sections being read in any order. The logistics function is often overlooked in the business, which leads to inefficiencies and loss. A focus on logistics is a major contributing factor to success. **PAM 5 'The Food Safety Miscellany'** is a tour of topics relevant to Food Safety and is meant to serve as a point of reference. The importance of maintaining a food-safe environment cannot be over-stated and PAM 5 aims to contribute towards that mission. PAM 5 is a handy guide to have at the workplace in support of training and development.

PAM 6 'Projects' is derived from an established, well-known framework and is presented as a series of templates that can be adapted for use at the workplace. The approach offers a structured, flexible, and product-based approach to project management that can be applied across industries and sectors. **PAM 7 'Interaction'** takes PAM 1 further and is a focus on advanced communication and coaching based on a Visual, Auditory, Kinaesthetic, Olfactory and Gustatory structure of language

Combined, the PAMs represent a **Systems Approach** to workplace improvements.

David Browne



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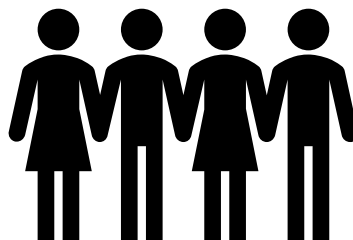


1 Personality Type Indicators

1.1 The **Myers-Briggs Type Indicator (MBTI)** is a recognised means of identifying the characteristics of personalities and individual preferences in how we go about our lives. Knowledge of MBTI increases general awareness and allows more successful management of professional relationships.

1.2 The personality type indicators combine to provide a profile that illustrates a preference:

<p>E or I Introversion or Extroversion. How we prefer to rest and recuperate.</p>	<p>S or N Sensing or Intuition. How we process and pass information.</p>
<p>T or F Thinking or Feeling. How we decide.</p>	<p>J or P Judging or Perception. How we set our personal values.</p>



1.3 The terms 'Introversion' and 'Extroversion' are used within the MBTI model outside of its usual meaning. This will become apparent later when the outcome of a questionnaire is looked at.

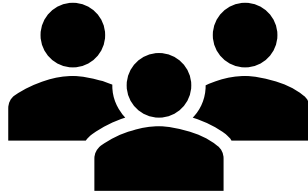
1.4 MBTI sits within the field of psychometric testing. You may have experienced psychometric testing yourself when, for example, applying for a job. The purpose of such tests is to identify personal, underlying psychological preferences in how the world is perceived, and how we prefer to operate in the world.

1.5 MBTI originated from the work of mother and daughter Katherine Briggs and Isabel Myers, who themselves based their work on Carl Jung. Their work identified 16 *profiles*, and while we may share characteristics of any of the profiles, individuals will have a bias or preference towards one.



'Personality Type' Questionnaire

1.6 After these guidance notes you will find a questionnaire sheet for each of the personality types. Each sheet contains a number of prompts or questions about how you might react or think. Clearly, not every scenario can be replicated here and so you might find that you need to go with your nearest thoughts.



1.7 How to complete the questionnaire:

For each pair of statements:

Allocate points to each of the statements

You have a maximum of five points to award *for each pair*

Allocate the points as you wish. For example: 4-1; 3-2; 5-0; 0-5

1.8 As you complete the questionnaire remember:

There are no *right* or *wrong* answers

There are no answers, only responses

Respond to which is the best fit, the closest description from each pair of statements

Be honest

Enjoy it. **Enter your profile below once you have completed the questionnaire**

Activity 1.1 Personality Profile

The highest *score* for each Indicator gives you

Your Profile: _____

Activity1.1



Personality Type Indicators

Personality Type Indicator: E or I

Question: **How do you recharge your batteries after a tiring day? How do you regain your energy?**

Response: **'I prefer to:**

		Result		
1	bounce my thoughts off others			develop my thoughts on my own
2	spend my leisure in social activities			spend my leisure 're-charging my batteries' alone or with just one other
3	share my troubles if I'm feeling down			think through my problems on my own
4	be included in conversations going on around me			detach myself from conversations around me
5	work with a group			working individually
6	be a high contributor in conversations			listen and weigh others' contributions while forming my own view

Response: I am:

		Result		
7	more sociable			more reserved
8	more of a joiner			more self-contained
9	inclined to verbalise my thoughts as they occur			inclined to formulate my thoughts internally before (perhaps) sharing them
10	in need of affirmation and recognition			in need of space and time to myself

Totals (Add up each column)		
Profile (Indicate the higher result)	E	I



Personality Type Indicator: S or N

Question: **How do you prefer to take in new information and knowledge, and to pass it on?**

Response: **'I prefer to:**

		Result		
1	deal with practical realities			consider abstract ideas, the meaning behind the obvious
2	build up knowledge piece by piece in a series of sequential steps			start with a general overview, then home in on the most interesting bit
3	work steadily through existing material			develop new ideas
4	experience it through my own physical senses			imagine what it might be like
5	focus on what is actually happening now			mentally reconstruct the past and imagine future possibilities
6	examine facts and details			avoid 'boring' detail

Response: I am:

		Result		
7	more realistic			more imaginative
8	practical			conceptual
9	down to earth			intuitive
10	literal-minded			an ideas person

Totals (Add up each column)		
Profile (Indicate the higher result)	S	N



Personality Type Indicator: T or F

Question: **How do you arrive at a decision? How do you make your mind up?**

Response: **'I am more influenced by:**

		Result		
1	objective facts and evidence			my interpretation of events and information
2	logical deduction			personal conviction
3	whether something is true or false			whether something is right or wrong in principle
4	whether a decision is accurate and just			whether a decision is kind and merciful
5	the appropriate and logical thing to do			what I believe is the best solution
6	the laws or rules governing the situation			my own and others' feelings about the situation

Response: I am:

		Result		
7	more objective			more considerate
8	analytical			sensitive
9	responsive to logic			responsive to feelings
10	cool-headed			warm hearted

Totals (Add up each column)		
Profile (Indicate the higher result)	T	F



Personality Type Indicator: J or P

Question: **How do you prefer to go about your life, your personal affairs?**

Response: **'I prefer to:**

		Result		
1	anticipate and control my day			take things as they come
2	work to a structured plan			wait and see what the task demands
3	avoid unforeseen eventualities			relish the unexpected
4	know where I stand			have flexible boundaries
5	use filing systems, diaries and lists to stay on track			be spontaneous about what to do and when
6	get things completed and ticked off			not be pinned down to deadlines

Response: I am:

		Result		
7	more organised			more spontaneous
8	disciplined			responsive to the moment
9	in control of time			open-ended about time
10	usually among the first to arrive for appointments			usually among the last to arrive for appointments

Totals (Add up each column)		
Profile (Indicate the higher result)	J	P

1.9 Enter your personality type profile in the box at Activity 1.1. The next several pages guide you through descriptions of each of the profiles. You may share characteristics across all of the profiles. However, if you have responded to the questionnaire honestly you should be able to identify your characteristics in the profile you arrived at for yourself.



Personality Type Descriptions

ENFJ

1 People oriented, sociable, easy to get to know, with concern for other people's feelings. Good socialisers who place great value on being accepted by others. Easy talkers, showing genuine interest in others. Easy manner.

2 Typically people of vision, preferring to deal with the abstract. Well organised and likely to put their ideas or imagination to good use. ENFJs like to plan things well in advance which, when applied to their love of creativity and design, suggests that they are likely to do well in environments where deadlines as well as imagination play such an important role.

3 Good at dealing with the unknown or unexpected, provided they know when and where they are going to do it. This preference for success in creative fields is accentuated by their easy manner.

4 ENFJs are usually enthusiastic and lively people who enjoy discussing and sharing their ideas with others. They are likely to spend a great deal of time and energy in hypothetical or conceptual discussions. They are typically very perceptive of others' feelings because of their natural interest in people. They show concern for the well-being of others. They will, therefore, observe others' behaviours and interpret it in several ways before hitting the right one.

5 In summary, ENFJs prefer to be outgoing, well organised people, who are very creative and value other people's feelings enormously. They are likely to do well in a stable creative environment with plenty of people around.

Organisational Contribution

6 Strong views on how organisations should treat people. Enjoys leading or facilitating teams. Encourages co-operation. Likely to communicate organisational values. Likes to bring matters to a successful conclusion.

Leadership Style

7 Through personal enthusiasm. Participative with people and projects. Likely to respond to followers' needs. Challenges the organisation to act. Inspires change.

Preferred Work Environment

8 People oriented, Social, Supportive, harmonious. Focused on individuals changing things for the better.

Potential Difficulties

9 May be over-loyal and idealise others. Ignore problems rather than deal with conflict. Favour relationships over task. May take bad news personally.

Professional Development

10 Recognise the limitations of others. Learn to manage conflict productively. Focus more on the details of a task, rather than the people involved. Develop the capacity to hear objective feedback.



ENFP

1 ENFPs are likely to be impulsive, to enjoy doing things at the last minute. Spontaneous and intuitive. They have ideas and act upon them straight away. They are associated with people of imagination, preferring to deal with the abstract and conceptual. They are less likely to enjoy environments that involve logical steady progression through set procedures. They typically dislike routine and the conventional. ENFPs prefer to be different, reactive and casual.

2 ENFPs, however, as they are sensitive people, would also be conscious of the effect of their actions on others. They tend to be easy to get to know as they wear their hearts on their sleeves but they are difficult to pin down.

3 ENFPs have unusual sensitivity towards others, they are enthusiasts and they are likely to take up a cause on a whim. They are, however, slightly unreliable because they dislike plans and schedules and are likely to be forgetful. If they miss an appointment, they will apologise most sincerely.

4 In summary, ENFPs are likely to be highly visible and demonstrative. They may work well under pressure, depending on last minute speed to get things done. They may give the impression of being casual and leisurely but, in reality, they are usually acutely active, mentally and emotionally.

Organisational Contribution

5 Proactive change, generate ideas, lead projects. Focused on the possibilities, especially for people. Energises others through their own enthusiasm. Appreciative of others.

Leadership Style

With personal enthusiasm and energy. Enjoys leading start-ups. Likely to be the spokesperson for others, particularly on issues affecting people. Will include, support and motivate others.

Preferred Work Environment

6 Focused on people and creative possibilities. Participative. Variety, challenge, colourful and unconstrained. Acknowledgement of intangible ideas.

Potential Difficulties

7 May move onto more exciting ideas or projects before completing those already started. May overlook relevant details. May try to do too much. Tends to procrastinate.

Professional Development

8 Set priorities and develop time management skills. Complete projects before starting new ones. Identify and focus on the important details. Prioritise projects rather than doing everything that looks appealing.



ENTP

1 Typically spontaneous, creative people. ENTPs are likely to be full of good ideas that they want to implement immediately. They are, however, also likely to use a logical approach so they will not jump into things without thought, largely because they like to be right. However, they are often impulsive and enthusiastic, sometimes making them difficult to keep up with.

2 ENTPs are often very social, easy to get to know and, at the same time may often appear to be casual and leisurely. This can make them difficult to pin down at a social level, since they enjoy the social scene, but do not plan ahead. In the work environment, this will probably manifest itself in 'going off at tangents' or doing whichever task seems most appealing at the time. This may make them difficult to work with, especially as they also value being right and are determined to see things through. Their lack of planning and organisation will often be seen as a fault by others.

3 ENTPs like talking about ideas, possibilities and concepts. They are likely to get involved in impromptu discussions with total disregard for whatever plans may exist. They will probably see nothing wrong with spending the morning discussing an idea with someone.

4 For all their impulsiveness, ENTPs usually have their feet on the ground, because they value logic, analysis, foresight and judgement. This combined with their determination, is likely to make them effective, especially as they are good at problem solving and quick on their feet.

5 They are likely to succeed where creativity, outward looking logic and analysis under pressure are valued, rather than in a routine, dependable and practical environment.

Organisational Contribution

6 Obstacles and constraints are viewed as challenges to be overcome. Provides frameworks and context for problem solving. Takes initiative and encourage others.

Leadership Style

7 Theoretical approach to meet organisational challenges. Logical. May encourage independence in others. Bring systems and people together.

Preferred Work Environment

8 Independence. Flexible, challenging, change orientated. Competent staff. Un-bureaucratic, with risk-taking rewarded.

Potential Difficulties

9 May become lost in the system and neglect realities. Could value competition over contribution from others. Tendency to over commit. May not work well with standard procedures.

Professional Development

10 Develop focus on the here and now. Learn to acknowledge others' contributions. Develop ability to work within the system to deliver their projects.



ENTJ

1 ENTJs have a powerful mix of attributes that means they tend to be good at whatever they do. Not only are they typically logical and well organised, but they also tend to have vision and imagination. When this is combined with their extroversion, which enables them to communicate their ideas in a lively manner, it is not difficult to see that they have great strengths.

2 ENTJs value being correct, using analysis, foresight and critical probing; usually share these skills with others. In a manager this may cause discomfort for a member of staff. Since they show their feelings freely and are determined to see the 'right thing' through, they may at times seem abrasive.

3 People with this profile may use their imagination to cope with problems with ingenuity. They are also open people, good communicators and efficient problem solvers. They are typically creative and well planned. They are likely to be capable of designing things to a prepared plan or, indeed, designing systems. Although they enjoy having theoretical discussions, they need to stick to prearranged schedules.

4 ENTJs usually like to think their ideas through. Although they will want to tell everyone about it, they will feel it is more important to tell people something that is correct and accurate.

5 In summary, ENTJs tend to be logical, well organised people who have the imagination and ingenuity to overcome difficulties, and the easy sociable manner to get on with almost anyone. They are likely to be enthusiastic, creative, decisive and determined, a formidable combination.

Organisational Contribution

6 Develops well thought through plans linked to broad goals. Adds structure and direction
Tends to take charge quickly. Deals quickly and effectively with problems and conflict.

Leadership Style

7 Energetic, action-oriented approach. Manage directly and will take control. Long-term visionary
Enjoy complex situations and problems.

Preferred Work Environment

8 Results oriented. Well-structured and efficient. Independent tough minded. Working towards resolving complex issues. Challenging and decisive.

Potential Difficulties

9 May overlook the needs of others. May overlook practical constraints. May come across as domineering and a rash decision maker. May ignore own needs and feelings.

Professional Development

10 Learn to appreciate others' needs and contribution. Check on the practical and personal needs before forging ahead. Learn to consider options and views before deciding. Learn to value own feelings and needs



ESTJ

1 ESTJs are typically conventional, practical, logical and organised. They also tend to be sociable, gregarious and enthusiastic. This makes them extremely good 'committee people', since they tend to enjoy group participation and are good at getting things going. ESTJs plan ahead and like things in their place, thus they can keep meetings on track. They usually arrive at situations well prepared, having done all that was expected of them.

2 ESTJs are easy to get to know, sharing their views freely; they place great store in being right and accurate, which can make them appear intolerant. ESTJs are firm and determined and not afraid to tell people what they want or expect. If crossed, they can be irritable.

3 They are typically interested in facts rather than ideas, and value stability and permanence, which makes them feel good in administrative and managerial roles. This trait is also likely to lead them to success in other fields where their talkative nature and organisational ability would be used to the full.

4 ESTJs like things to be done properly and are sometimes viewed as pedantic in their need for order. They are often lively, hearty people but can come across as insensitive to the feelings of others. They tend not to understand what they cannot see or touch and can be impatient with the abstract or hypothetical.

5 In summary, ESTJs are most at home with logic, facts and systems and are talkative, open and enthusiastic.

Organisational Contribution

6 See problems up front. Analyse projects and ideas in a critical, logical fashion. People, processes, products orientated. Monitor and follow through to see the job done.

Leadership Style

7 Takes charge directly and quickly, going straight to the core of a situation. Uses past experience to solve problems. Quick to decide. Respects traditional leadership hierarchies.

Preferred Work Environment

8 Hard working. Focused on getting jobs done correctly. Well-structured and organised. Stable and predictable.

Potential Difficulties

9 May decide too quickly. May not see the need for change. Can over-look the needs of others in the desire to get the job done.

Professional Development

10 Learn to take consideration of all sides before deciding. Develop the capacity to see the need for change and embrace it. Make more effort to show appreciation of others' efforts. Reflect on and identify their own needs and values.



ESFJ

1 ESFJs tend to be very friendly people. They enjoy other people's company and care about others' feelings and well-being. They place great value in being appreciated by others and mix well in groups.

2 They are also typically conventional, supporting established methods and traditions. They may be sentimental about long-established customs or traditions. This could make them difficult to persuade regarding new ideas and methods at work. ESFJs prefer to deal with the well-established processes they are used to, rather than with novel ideas or concepts.

3 ESFJs are usually softly down-to-earth, well organised and practical. Their whole life is likely to be sensitively disciplined and centred on well-structured routines and sensible patterns. They are realistic which is unlikely to make them great optimists, but they do like decisions to be made; it makes things neat and tidy.

4 ESFJs could find success in such roles as administrators or business support functions, where they would be supporting other people, having their best interests at heart. These roles would enable them to utilise their ability to deal with people at all levels in a friendly way that is tempered with realism.

5 Any job that requires an organiser who is most at ease with other people and yet is enthusiastic will suit an ESFJ.

Organisational Contribution

6 Works well with others, especially in teams. Pays attention to people's needs. Completes tasks to schedule and with accuracy. Respects rules and authority. Deals with daily operations efficiently.

Leadership Style

7 Attention to others. Build goodwill through building relationships. Will keep people well informed
Likely to set a personal example of hard work and perseverance. Likely to uphold organisational traditions.

Preferred Work Environment

8 Conscientious, co-operative and sensitive people oriented to helping others. Friendly and appreciative. Well organised and goal-oriented approach. Facts based.

Potential Difficulties

9 May avoid dealing with conflict and ignore problems. May override own priorities in an effort to please and help other people. May assume they know what is best for others. May not always step back to review the bigger picture.

Professional Development

10 Conflict resolution. Develop skills in listening to what others really want. Learn to see the logical or wider implications of their decisions.



ESTP

1 The 'entrepreneurs' due to their desire to deal with facts and people, their logic and determination, coupled with the fact that they may work best under pressure and are, typically, highly reactive.

2 ESTPs usually thrive on making things happen, value analysis and judgment, and often enjoy emergencies. Last minute problems do not disturb ESTPs because they can stay calm and think through the situation analytically, sticking to the facts. They tend to be enthusiastic, hearty and lively. They are likely to carry people along with their in-built confidence in their ability to cope. They may sometimes appear casual or leisurely because they do not worry that problems will prove too difficult.

3 ESTPs may be conventional, supporting established methods and doing things in an accepted way. If a new method of doing something is presented to them, it would have to be extremely logical for it to be accepted, and you would need to be able to demonstrate an immediate payoff. An ESTP is likely to analyse and probe new concepts for weaknesses. They are not usually overly concerned with the long term.

4 ESTPs are often unplanned, which can sometimes be at odds with their logical approach. If there is a plan, they are likely to want to change it, but there will be a logical reason. They may be sociable and easy to get to know.

5 In summary, ESTPs are doers rather than organisers. They make things happen because of their enthusiasm and factually based logic. They unlikely to prosper in strictly organised, highly disciplined environments, because they like to make up their plans as they go along.

Organisational Contribution

6 Negotiation, compromise. Makes things happen, realistic approach. Embraces risks. Notices and remembers factual information.

Leadership Style

7 Likely to take charge readily in a crisis. Uses a direct and assertive style. Looks for the most direct way forward. Seeks action and short-term results. Persuades others to their approach or views

Preferred Work Environment

8 Lively, results oriented. Flexible and responsive to the immediate situation. Low bureaucracy Pleasant surroundings.

Potential Difficulties

9 May appear blunt and insensitive. May miss the consequences of actions. May tackle the next situation at the expense of following through the last.

Professional Development

10 Take account of others' feelings. Develop the capacity to look beyond the quick fix, to the wider implications. Develop perseverance in completing tasks



ESFP

1 ESFPs are usually sociable and sensible. They like and enjoy being with other people, normally in conventional pursuits. They will join in the task of the group and work easily with anyone. ESFPs like to focus on factual topics since they are more interested in the concrete than the abstract. They are likely to support established methods of doing things.

2 ESFPs value other people's feelings and may be prone to sentimentality. In discussions with others they may be aware of (and concerned for) another's feelings and reactions. ESFPs are often easy to get to know and are thought of as warm and kind.

3 ESFPs are helpful in a practical way. They will willingly do things for other people or show them how. They can be spontaneous and impulsive and may dislike planning, revelling in the pressure of the last minute or the unexpected. They are usually realistic and so are unlikely to leave themselves too little time to do things.

4 ESFPs are likely to be successful in practical or factual environments where there are other people to deal with, but where schedules are not important. Managers with an ESFP profile may find it difficult enforce discipline at work or negotiate with in difficult situations. Instead, they are more likely to use their strengths, namely enthusiasm, energy, common sense and concern for others.

Organisational Contribution

5 Brings enthusiasm, co-operation, action and excitement. Likes to bring people and resources together. Accepts and deals with people as they are. Presents a positive image of the organisation to others.

Leadership Style

6 Through promoting teamwork and co-operation. Deals well with crises. Will manage conflict by pulling people together. Collaborative, collegiate.

Preferred Work Environment

7 People oriented, easy going with a focus on the here and now. Lively, action oriented
Harmonious and pleasant to work in.

Potential Difficulties

8 May rely on subjective information. May not reflect before taking action. May spend too much time socialising at the expense of achieving tasks. May not always complete the task.

Professional Development

9 Include logical reasons in their decision making. Learn to plan ahead and stick to project plans
Work on time management. Balance task completion with own interests.



ISFJ

1 ISFJ's tend to be quiet and unassuming people who value others' feelings. They form deep and lasting friendships with a few and value that friendship showing great warmth and affection. They also tend to display a lot of common sense, being realistic and conventional people. ISFJ's prefer to plan things well in advance, keeping to routines and systems. They tend to be practical people who will do the sensible thing in a well-ordered fashion.

2 ISFJ's are likely to have their routines and their own way of doing things. They will get on quietly with their well-ordered lives, comfortable when they can control and guard the status quo. They are likely to react if others try to disrupt the pattern.

3 ISFJ's like making things while working with other people. People around them will find them helpful and caring. They tend to make good trainers of practical subjects or more scientific tasks.

4 In summary, ISFJ's are quiet people who generally prefer their own company. However, they value certain friendships greatly and are always sensitive to others' feelings. They are practical and well organised, dealing mainly with the down to earth realities in a well-structured manner.

Organisational Contribution

5 Aware of the practical needs of others. Will follow organisational goals to completion. Process, detail and routine orientated. Will expend effort to help others. Likely to deliver the right thing, at the right place, at the right time.

Leadership Style

6 May be reluctant to take on leadership role unless asked. Expects everyone to meet organisational standards and goals. Will look for practical results. Likely to influence behind the scenes.

Preferred Work Environment

7 Conscientious people working in a structured way. Calm and quiet. Secure. Efficient and well structured. Service orientation.

Potential Difficulties

8 Tendency to be pessimistic. May be undervalued because of their quiet unassuming style. May not be as flexible as the situation requires. May not come across as tough minded when influencing others.

Professional Development

9 Develop alternative ways of doing things. Learn to be more assertive and direct. Publicise their own achievements. Develop seeing the future in positive, big picture terms.



ISTJ

1 ISTJ's are typically quiet, orderly people. They are usually practical and realistic, systematic and careful with detail, preferring to work with facts and concrete issues rather than imaginative ideas and concepts. They often like to be on their own when working.

2 ISTJ's like systems, methods and organisation in their lives. They value logic, evidence and accuracy and tend to be meticulous. They like to see everything in its place. ISTJ's may analyse situations, and probe for factual evidence so that they can make judgments and decisions effectively. They can be quite determined in pursuing their goals. In the process they run the risk of upsetting others since they are not naturally mindful of others' points of view. ISTJ's often find it difficult to understand that other people do not approach things with the same detached objectivity and logic that they themselves apply.

3 ISTJ's tend to be calm and well planned in their approach. In fact, they seldom get excited or stressed; such is the orderly nature of their approach. They may get immersed in projects, seeing them through to the end.

4 ISTJ's like people to say what they mean. They are not interested in any sort of equivocation. They may be highly dependable and take pride in being so. They can be hard to get to know and only close friends will ever penetrate their guard. Others may find this somewhat frustrating but, in fact, the ISTJ gets a great deal of satisfaction from this well-ordered lifestyle.

5 In summary, ISTJ's are reserved, conventional, logical and organised. They are sensible and careful and can be relied upon to fulfil whatever task is set in a thorough and positive manner.

Organisational Contribution

6 Gets things done to schedule. Usually careful with detail. Can be relied upon to meet commitments. Works well within a defined organisational structure.

Leadership Style

7 Use of facts to make decisions. Adherence to prescribed procedures. Focus practical organisational needs.

Preferred Work Environment

8 Hardworking, focused on facts. Secure, Well-structured, Orderly, Steady pace, Task-oriented. Privacy for uninterrupted work.

Potential Difficulties

9 Narrow focus on the short-term. May expect others to conform. May discourage innovation or risk-taking. May become inflexible and resistant to change. May neglect the interpersonal niceties.

Professional Development

10 Focus more on the long-range implications. Be more people orientated. Develop the capacity to recognise and embrace the need for change. Develop patience for implementing and experimenting with new ways of doing things.



ISFP

1 ISFPs are typically quiet but reactive. They are reserved yet enjoy the challenge of emergencies. ISFPs may leave things to the last minute, and then get on calmly without fuss.

2 ISFPs usually value other people's feelings and express their kindness in a practical yet sensitive way. They tend to be generous hearted, even when they themselves cannot afford to be. ISFPs are not usually good at planning so they need to avoid situations that require them to follow strict schedules. ISFPs are not typically inventive and will follow established methods of doing things even though their sense of timing may not conform to the system.

3 Being typically shy and retiring, ISFPs often find it difficult to express thoughts and feelings in conversation, unless with someone they know well. They often use the written word to convey their thoughts.

4 Whatever they choose to do in life, ISFPs do it in a calm, undemonstrative and sensible way. They do not normally like events involving lots of social interaction. They would much prefer a quieter environment.

5 In summary, ISFPs are quiet, reserved and calm, operating in a practical down to earth manner. Yet despite this gentle, sensitive side to their nature they may be easily bored, enjoy change and dislike being tied down.

Organisational Contribution

6 Will ensure the well-being of others. Brings a quiet sense of pleasure to their work. Brings people and tasks together by promoting co-operation.

Leadership Style

7 Likely to promote a co-operative team approach. Will motivate others through personal loyalty. Will gently persuade others by appealing to their best intentions. Likely to adapt to whatever is needed. More likely to praise than criticise.

Preferred Work Environment

8 Co-operative, people oriented. Flexible, with private space for reflection. Courteous and low conflict. Pleasant surroundings.

Potential Difficulties

9 May be too trusting. May be overly self-critical, yet not providing sufficient constructive feedback to others. May not see beyond the present, or perceive things in a wider context. May be too sensitive and withdraw if felt slighted

Professional Development

10 Learn to be more analytical and challenging of information. Learn to give constructive feedback to others, whilst appreciating own qualities or achievements. Develop a more future oriented perspective. Be more assertive and direct with others.



ISTP

1 ISTPs are typically quiet, sensible, logical yet impulsive. They are happier with facts rather than theory, but dislike planning ahead. For this reason, they are likely to get bored easily, they absorb the facts then want to move on. They often have lively minds dealing with things quickly then looking for something new. They may overlook the implications, especially long-term effects.

2 On the one hand they can be sensible, practical and analytical, and on the other hand they can be impulsive and reactive, giving the impression that they are casual even leisurely. However, the ISTP is quiet and reserved and such conflicts (if they exist) will be kept well hidden.

3 ISTPs are often unsuspected heroes, since they show tremendous resourcefulness in an emergency, and during such an eventuality they will cope far better than most. ISTPs often thrive on such situations, remaining calm. They believe in their ability to survive but are very unlikely to tell others of this belief.

4 Communication is not usually an ISTP strength. They only talk if they can see a reason and are quite likely to say exactly what they think; they may also expect others to do the same. ISTPs tend to prefer to write things down than get into conversation.

5 ISTPs are often practical. They are usually among the first to come to a practical solution when something breaks or stops working.

6 In summary ISTPs are quiet, private people whose energies are usually channelled into practical activities. They seldom plan ahead preferring instead to act on the spur of the moment. However, they are essentially sensible, logical and determined.

Organisational Contribution

7 Trouble-shooters, able to meet the demands of the moment and stay calm in a crisis. A source of information. Gets things done despite the rules, not because of them.

Leadership Style

8 Through action or by personal example. Treat everyone as an equal. Manages with minimal supervision.

Preferred Work Environment

9 Action oriented. Unconstrained by rules. Problem solving, project context. Fosters independence.

Potential Difficulties

10 May keep things to themselves and appear unconcerned to others. May move on before completing a project. May look for ways to do things more expeditiously or take short cuts. May appear indecisive or un-directive.

Professional Development

11 Share concerns and information more with others. Develop perseverance. Learn to plan and put effort in to achieve results. Set goals.



INFJ

1 INFJs tend to be quiet and reserved with vision and imagination. They are often in the background, happy to carry on creating or designing things without any fuss. Even when they make something truly original, they are unlikely to show too much excitement. INFJs shun the limelight and work for the sake of the act or cause. They may find a lot to say to certain people under certain conditions, particularly around the abstract or conceptual.

2 INFJs are usually gentle and well organised people. Other people's feelings are important to them and they probably find it necessary to organise things, so as to cause the least inconvenience to others. INFJs plan ahead and will include the best interests of other people in those plans. This may result in them being regarded as fussy, or over-sensitive to the needs of others, because they may organise people who do not want to be organised.

3 INFJs are often original and comfortable dealing with the unknown and the abstract. INFJs may dislike pressure, preferring to plan ahead, creating systems. They do not like high pressure situations, much preferring calm order. Signs of potential conflict can often cause them a great deal of discomfort.

INFJs are organised, sometimes to the point of perfection; systematic, punctual and with a liking for routine and permanence.

Organisational Contribution

4 Future oriented; People orientated. Completer, finisher. Works conscientiously and consistently. Organises complex interactions between people and projects.

Leadership Style

5 Leads through personal vision of what is best for others and the organisation. Wins commitment rather than demands it. Inspire others through ideals. Works in a quiet but persistent fashion. Focused on making the vision real.

Preferred Work Environment

6 Harmonious, quiet and supports concentration. Allows time and space for creativity and reflection. Well organised. Contains people who value making a difference to human well-being.

Potential Difficulties

7 May find their ideas are dismissed, overlooked or underestimated. May not be openly as critical as needed. May operate with too single-minded an approach, thus ignoring wider issues or tasks to be done.

Professional Development

8 Be more assertive and publicise own ideals. Develop the skills of giving timely constructive feedback to others. Share more of what they do, or are thinking, with others. Be more relaxed and prepared to explore what can be done in the current situation.



INFP

1 INFPs are associated with the qualities of the archetypal artist. They are typically quiet and reserved, preferring to keep away from the crowds. They tend to be highly creative and original, care about people and need acceptance; and they work spontaneously. They are usually imaginative, preferring the theoretical to the factual. They may be difficult to get to know, and often prefer working quietly on their own at creating things or solving problems. INFPs tend to form deep friendships with a few people, preferably people who share their interests and with whom they can have long, interesting conversations about ideas, theories and concepts.

2 INFPs usually work best under pressure. They may shy away from making detailed plans, much preferring to take things as they come. At the same time, they care about other people's feelings, so may be careful that however impetuous their actions, they may not cause harm to someone else. They may be described as *inspirational* since they are capable of having new ideas and acting on them instantaneously, albeit quietly and without fuss. In fact, INFPs can cause difficulties for those around them because they are liable to think of a solution to a problem and rush off and implement it without telling anyone.

3 INFPs can seem calm, even casual or leisurely. This is because they prefer not to be constricted by systems and tend to be less excited about events than most. On the other hand, they can be highly active when something stirs their imagination, be it an interesting new concept or something they care about passionately. On these occasions they burst into action.

Organisational Contribution

4 Facilitates team contribute. Can be persuasive. Ties the team around a common goal. Seeks new ideas and possibilities. Will quietly pursue organisational values, especially if focused on people.

Leadership Style

5 Participative and facilitative. Will be more energised by unique rather than conventional leadership roles. Will work independently towards their vision. Likely to encourage others to follow their ideals. More likely to praise than criticise.

Preferred Work Environment

6 Co-operative and flexible. Calm and quiet, room for privacy and reflection. Bureaucratic.

Potential Difficulties

7 May be a perfectionist, and delay completing tasks. May try to please too many people. May not adjust their vision to reality. May reflect too much.

Professional Development

8 Quicker grasp of the reality. Become more tough-minded, More emphasis on facts and logic as well as personal values. Learn to develop and implement action plans.



INTJ

1 INTJs are likely to be successful in a wide variety of fields because they tend to be imaginative, logical, well organised and good at problem solving. This gives the advantage and strength of being able to think through their ideas and form them into plans.

2 INTJs are usually quiet, reserved and often private people who prefer dealing with the unknown and theoretical. They may be hard to get to know, preferring to talk to certain people, under certain conditions. They will probably be talking about concepts, values and ideas.

3 INTJs value being correct and precise in their judgement, using logic and analysis to reach conclusions. This gives their creations or ideas greater credibility since they are very unlikely to propose them until they are sure they ought to be accepted.

4 INTJs are typically well organised, systematic and organised enough to meet the deadlines and cope with a heavy workload.

5 INTJs are seldom charismatic leaders because they shun publicity or the limelight and do not often appear outwardly excited about things. They do, however, have the attributes to manage small numbers of people but are unlikely to be particularly stimulated by the responsibility.

6 In summary, INTJs are creative, imaginative people who value precision and like to achieve goals by using logic in a planned, unpressured way. They are quiet, reserved people who get things done using ingenuity and determination.

Organisational Contribution

7 Strong conceptual and design skills. Organises ideas into action plans. Holds a strong belief regarding order. Will work to remove obstacles. Views the organisation as a whole. Understands workplace systems.

Leadership Style

8 Strong drive for self and others to achieve organisational goals. Can be tough minded with others. Conceptualises and designs complex solutions. Will reorganise the whole system if needed.

Preferred Work Environment

9 Long term approach. Decisive, intellectually challenging people who are effective and productive. Task focused and efficient. Opportunities for creativity and autonomy. Time and space for reflection.

Potential Difficulties

10 May appear so commanding that others are afraid to challenge them. May have difficulty in letting go of impractical ideas. May ignore the impact of their vision, style or action on others.

Professional Development

11 How to appreciate others. Learn when to let go of a concept or idea. Be more aware of their impact on others. Solicit input from others, including ideas, suggestions and feedback.



INTP

1 INTPs are usually quiet, creative people. They tend to be difficult to get to know and are content in their own world of imagination and ideas. INTPs have a lot to say to certain people under certain conditions and these discussions will concern theoretical or abstract topics or outline plans for their ideas.

2 INTPs can be logical yet spontaneous. They think things through clearly, but dislike making plans. If they have an idea, they will work it out, often using analysis, then want to implement it with great determination, but without delay. They are typically reserved and calm, yet firm and resolute in their conclusions. They value being correct and will challenge others' views if they doubt their validity. It may be hard to know what an INTP thinks or feels but there is a lot going on inside, much of it ingenious.

3 INTPs may also be impulsive. They often prefer to deal with things as they arise and dislike planning ahead. They enjoy working under pressure and are usually successful at dealing with the unexpected. They can be difficult to pin down. They will often do things on the spur of the moment and forget to tell anyone where they are going; sometimes appearing disorganised and distant.

4 INTPs are happy to have a few good friends. They may dislike crowds and prefer a quieter environment.

5 In summary, INTPs are quiet, reserved, creative people who, nevertheless, value accuracy and use logic. They can be impulsive and determined; and may be difficult for the more *conventional* to understand them.

Organisational Contribution

6 Designs logical and complex systems. Uses expertise in dealing complex issues. Uses short term and long-range thinking. Applies logic, analysis and critical thinking. Focus on the core issues.

Leadership Style

7 Through conceptual analysis and goals. Prefers to lead other independent types. Seeks autonomy for themselves. Relates to others in terms of expertise rather than position. Interacts on an intellectual rather than emotional level.

Preferred Work Environment

8 Independent thinkers focused on complex problem solving. Unstructured and self-supporting. Quiet, reflective, flexible.

Potential Difficulties

9 May be too abstract and unrealistic. May be too theoretical or complex in their explanations. May focus on inconsistency at the expense of teamwork and harmony. Impersonal, critical approach

Professional Development

10 Focus on practical details and completion. Learn to state things more simply. Show an appreciation of others' input. Be more people orientated.



Activity 1.2 Team Profiles

The tables below show the relationships between the different profiles. Profiles within the same box are closest in personality style and preferences. The further away from each other the profiles appear, the more differences there are. This can be used to help teams function even more effectively, and to build balanced (or deliberately one-sided) teams.

How can you apply this with your team?

Activity1.2



Personality Type Indicators: Creating balanced teams

Sensing Introverts	
ISTJ Makes the system work	ISFJ Puts duty to others above self
ISTP I'll just get on with it	ISFP Shows caring through actions not words

Intuitive Introverts	
INFJ Committed yet gentle	INTJ Intellectual strategist
INFP Inspirational dreamer	INTP Architect of solutions

Sensing Extroverts	
ESTP Let's go!	ESFP Bubbly free spirit
ESTJ Practical Implementer	ESFJ Kind friend to everyone

Intuitive Extroverts	
ENFP Enthusiastic motivator	ENTP Spontaneous dynamic
ENFJ Articulate persuader	ENTJ Takes charge





Activity 1.3 Scenarios and Profiles

It is important to remember that all personality profile does is to identify naturally occurring differences in personality traits and preferences between individuals. There is no right or wrong profile. **Respond to each of the scenarios below.**

Activity 1.3

Scenario 1

John tries to be as fair as he can with his team. He tries to ensure that everyone gets on together. Recently, he has been a keen advocate of the company's latest Lean initiative. Even so, he did have some reservations and brought put these to his manager. John sometimes gives his team a little too much leeway, and when there is an issue, it can fester for a while until he will deal with it. John's response to his most recent Appraisal wasn't too good; he seemed to react badly to some constructive criticism.

Your comments on John?

Scenario 2

Janet can be relied on to get the work done to standard and on schedule. She will follow procedure to the letter to make sure she has all the right information. Her workspace is well organised and she will get through her tasks on her own and at a pace that suits her but meets the current needs of the company. Janet can be a bit cautious sometimes, and inflexible when working with others. The company is going through a period of change and so Janet could benefit from some Change Management coaching.

Your comments on Janet?

Scenario 3

Steve really shone recently when he was part of a Cross-functional Team. He seemed to relish being given the freedom to concentrate on the issues. He was instrumental in coming up with an idea that took into account the whole operation. Steve was able to identify the root cause without getting side-lined by red herrings. He liked the intellectual challenge the problem gave him. There were a couple of occasions though when Steve had to be brought back on track because his ideas were a bit *out there* and no one understood them, or him.

Your comments on Steve?



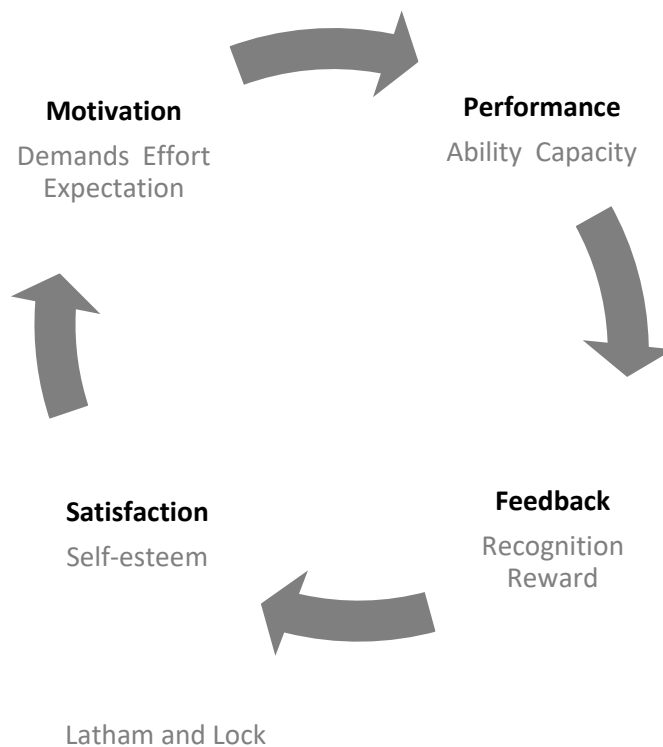
2 The Cycle of Motivation

2.1 Engaged staff are more interested in their work and contribute more to the team. Engaged staff are more motivated, and a manager can increase that motivation by paying attention to some key areas. Tasks should be given that are within an individual's **ability and capacity** to carry them out.

2.2 Adequate support should be available when a member of staff is taken out of their comfort zone or given a challenge. **Feedback** should focus on specific events or behaviours based on the Standards required; Standards which are measurable and observable. Good performance needs to be recognised and some kind of reward given. People are not always motivated by financial reward so others such as time, or tasks, or positive comments at the performance review may be more appropriate.

2.3 These kind of actions by a manager can lead to **satisfaction** and higher levels of self-esteem. Increased self-esteem leads to increased **motivation**, greater effort, demands for even more opportunities by the member of staff, and an expectation for further involvement and development.

The Cycle of Motivation





Activity 2.1 Improving Motivation

What steps can you take to improve motivation within your team?	Activity 2.1
Performance. Ability / Capacity	
Feedback. Recognition / Reward	
Satisfaction. Self / Team	
Motivation. Demands / Effort / Expectation	



3 Congruence

3.1 Linked to motivation is the ability to assess whether somebody is ‘on board’ with what you say and your plans, whether there is congruence or incongruence. You will already have developed a *knack* for reading body language and micro-signals. The skill is to deliberately read those micro-signals and act on them.

3.2 These micro-signals are non-verbal and give clues to an internal dialogue that is going on inside the person you are talking with. They are indicative of an internal, private discussion that it might be useful to be able to draw out into the open.

3.3 There are some limitations. For example, cultural differences may illicit different responses. Looking away while in discussion may, in one culture, take a particular meaning such as rudeness or distraction, while in another it could signal respect and concentration.

3.4 A single signal on its own may mean little, but together, repeated and after you have calibrated the responses, (compared them against similar but sufficiently different circumstances), they can be invaluable contributions to the conversation.

Typical micro-signals

Tension showing in the neck and shoulders	‘Smiling’ with the eyes	The angle of the eyebrows
Tension around the mouth	Tense hands	Skin tone (paleness)
Deep/Shallow rate of breathing	Temples ‘Flaring’	Rapid blinking
Tension in the vocal cords	Eye contact- staring	‘Pitch’ of voice
	Swallowing (dryness)	Blushes (localised around the neck)

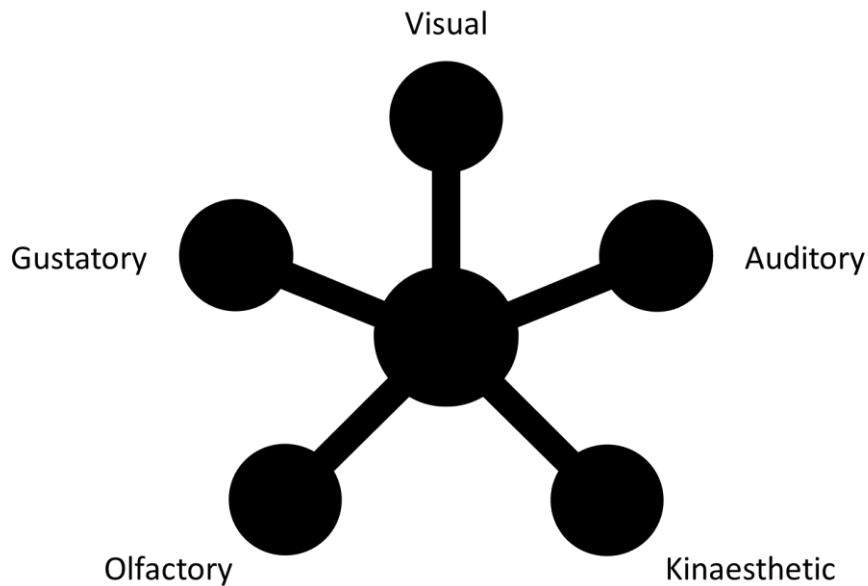
Activity 3.1 Noticing internal dialogue

When next in conversation actively look out for micro-signals and allow these to guide the conversation.	Activity 3.1
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4 Representational Systems



Bandler and Grinder

Representational systems (VAKOG)

4.1 As we experience events, we re-create those experiences inwardly by the sights remembered (Visual), the sounds heard (Auditory) and the emotions felt (Kinaesthetic / tactile). Two other ways events are recreated are through smell (Olfactory) and taste (Gustatory). These senses are used to perceive the world and re-present it to ourselves.

4.2 For example, where someone says, 'I see what you mean', they cannot possibly mean that literally, visual language has been used in the re-representation of the experience. The person has a sense they understand and has used visual language to convey this.

4.3 In this example the communication is more easily continued by matching the representation preference used, 'That's great, now have a look at this'. Listening carefully to the words and phrases used in conversation, and then 'matching', is one way of communicating even more effectively.



Activity 4.1 Representational Systems- Scenario

You receive a new piece of equipment for your workplace; it has the very latest technological features. It's up to you to get the new piece of equipment up and working. Do you:

- a. Read the manual and check the component parts.
- b. Hold a team meeting to discuss its introduction.
- c. Get 'hands-on' as quickly as you can.

Activity 4.1

You can probably identify the Visual, Auditory and Kinaesthetic preference here. Representational systems are flexible; individuals will have different preferences under different conditions and scenarios. The idea is to recognise them: VAKOG. Then communicate more effectively by matching.

Examples:

'I can follow a discussion if I'm able to see the other point of view' (V)

...good, we'll have a look at it later then from all angles...

'If it sounds ok, I'm happy' (A)

...right, let's carry on the discussion with them and hear what they've got to say...

'I make important decisions by how I feel about it' (K)

...think it over and let me know how you feel about it when we next get together...

'The last event left the team feeling a little bitter' (K and G)

...we'll have to make sure we improve on that, and make sure we leave them feeling happier...

Matching a preferred representational system (VAKOG) eases the communication.

Finally, next time you're in a discussion, notice the confusion that arises if you 'mismatch'.



5 Learning Styles

5.1 A learner will have a preference for the way new information or skills are acquired. Training should be flexible enough to respond to the learner's style. However, it is a rare event for trainers to be given the opportunity to ask learners to complete a questionnaire that would identify learning styles. Therefore, a key skill for a trainer to develop is to recognise the learner's preference and adapt the training accordingly. What follows is a brief description of each of the learning styles.

5.2 **Activists** 'Let's do it'. An Activist will want to 'get on with it.' Anything other than the job in hand is a distraction. An Activist is quite happy to be thrown into the deep end and so there is less concern over the fear of failure. They will simply experience the event as a challenge and try again. Being outward looking, the Activists' character is likely to be more extrovert and so they tend to make training a lively event. **The motto of the Activist is, 'Let's do it'.**

5.3 **Reflector** 'Let me think about it first'. These are the direct opposites of Activists. Reflectors learn more easily when given time to process new information or to master new skills. They will want to have a sense that they understand what they are doing. A Reflector is unlikely to be the first to volunteer to try the new skill being taught but will hold back until they are ready. However, once a Reflector is happy that they have been given sufficient time to filter and absorb the new information they will participate as fully as any other learner. **The motto of the Reflector is, 'Let me think about it first'.**





5.4 **Theorists** 'Give me the details'. Theorists enjoy learning experiences where lots of detail and facts are included. They are methodical learners who are able to take in chunks of complex information and make sense of it. What matters is that the detailed information is presented in a logical, ordered manner. Theorists are most likely to be unemotional learners, preferring to get absorbed into the technical aspects of a job being taught to them. **The motto of the Theorist is, 'Give me the details, logically'.**

5.5 **Pragmatist** 'Tell me why'. Learners with a preference for understanding how what is being taught is relevant to the workplace are Pragmatists. They will remain attuned to the training if they sense that it relates to what they do. A Pragmatist will become frustrated with training that they perceive as having no relevance to what they do. However, once convinced of the usefulness of the training they are receiving the Pragmatist becomes an enthusiastic learner. **The motto of the Pragmatist is, 'Tell me why'.**

Honey and Mumford



Learning Styles

Activist 'Let's do it'	Reflector 'Let me think about it first'
	
Theorist 'Give me the details, logically'	Pragmatist 'Tell me why'
	

Learning and information

Though the theory of learning styles has been widely popularized, it is also a topic of debate, with some research questioning its validity. However, understanding different learning styles can help educators diversify their teaching strategies and accommodate a variety of learners.

How we learn is also influenced by our Representational Systems. These are the Visual, Auditory, Kinaesthetic, Olfactory and Gustatory means by which information is processed. PAM 7 'Interaction' explores this area further.



Activity 5.1 Workplace activities and learning

Thinking about future workplace activities, what can you do to ensure the activity is attractive and effective for all types of learners?

(Learning Styles is examined further in PAM 2 'Training').

Activity 5.1

Activists

Reflectors

Theorists

Pragmatists



6 Time Management - Establishing Priorities

6.1 Everything needs doing and it needs doing now, right? Wrong. Managers need to be able to prioritise their tasks so that things get done in the most efficient way. Continually reacting to events, or 'firefighting', is seldom the best position to be in. The manager can become distracted, resources not deployed to the best effect, and time lost that cannot be recovered.

6.2 It is much better for the manager to be able to identify important tasks from those that are not important, or urgent task from non-urgent ones.

6.3 Once priorities have been established the manager can then decide how to tackle the tasks more effectively. It might be possible to delegate some tasks or put them aside until later. Doing this allows the manager to focus on the priorities.

Establishing Priorities (in relation to Daily / Weekly / Monthly Routines (DWMs))

Urgent/Important	Not Urgent/Important
<p>Deadlines will be missed if tasks listed here are not done in time. Consider delegating other tasks so that your attention can be on these.</p>	<p>Tasks in this area should be completed before they become Urgent. Plan ahead by putting time aside for these tasks.</p> <p>In PAM 3 'Improvements' we look at Leader Standard Work, a Lean approach to your Daily, Weekly, Monthly routines.</p>
Urgent/Not Important	Not Urgent/Not Important
<p>Tasks here are normally Urgent for other people but Not Important to you and usually involve providing information for other people.</p> <p>Maintain effective working relationships by allocating time to these.</p>	<p>Tasks in this quadrant will be Important for someone and may become Urgent if ignored. These tasks may be the least of your own priorities but you need to do them. Such tasks should not be ignored; we function as a team. Consider what could be delegated.</p>



Activity 6.1 Own DWMs

Complete your own matrix to establish your priorities. Some of these will become part of your regular routines, your DWMs, (sometimes referred to as Leader Standard Work).

This Activity could also form the basis of a discussion with your team.

Activity 6.1

Establishing Priorities (in relation to Daily / Weekly / Monthly Routines (DWMs))

Urgent/Important	Not Urgent/Important
Urgent/Not Important	Not Urgent/Not Important

Activity 6.2 Establishing DWMs (Also referred to as 'Leader Standard Work')

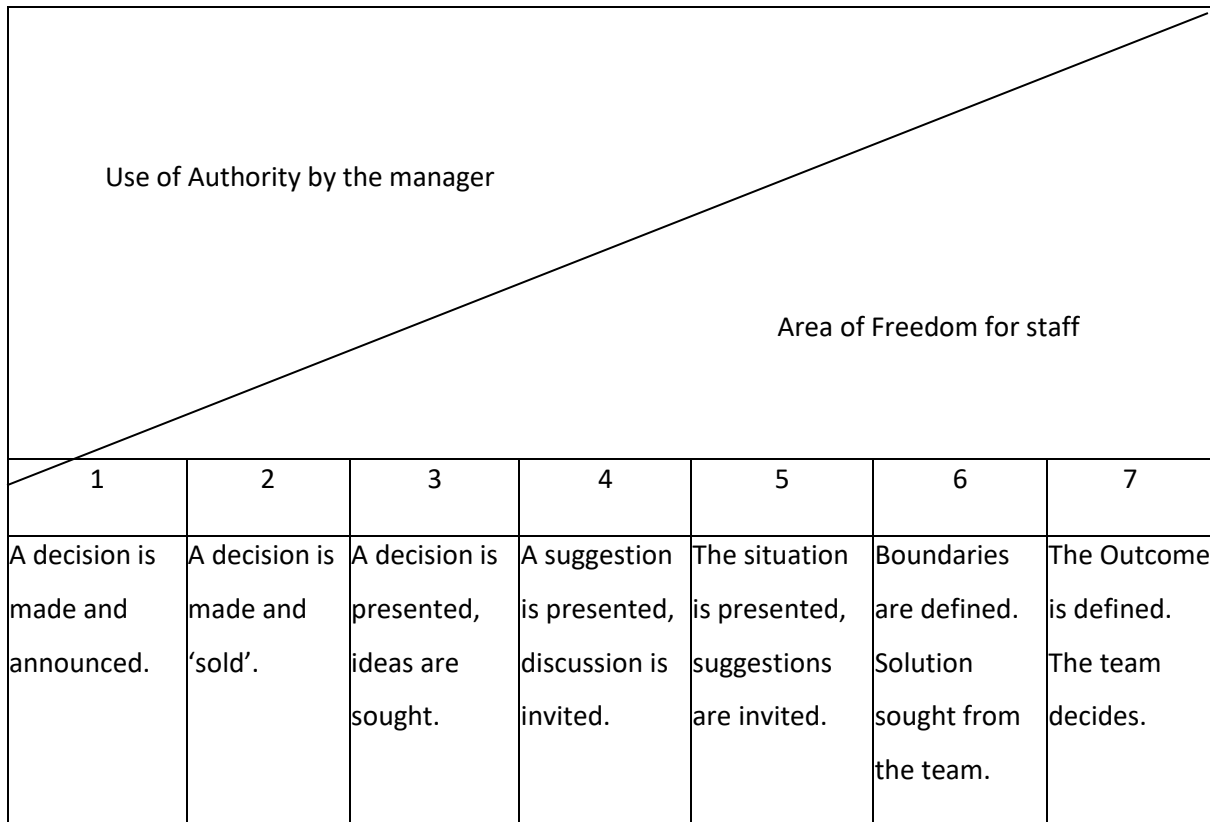
Having completed your priorities matrix, schedule them within your day, week month, year. These are now your Daily, Weekly, Monthly routines, DWMs. Your DWMs are not fixed and will develop over time and should be coordinated with those you work with.

You can use your DWMs to develop the team by delegating elements of it to them.

Activity 6.2



7 Management Styles - Authority V Freedom



Tannenbaum and Schmitt

7.1 A manager can expect to exercise authority to varying degrees throughout the shift. Different situations and people require different responses ranging from, at one extreme, a hands-on approach, to *laisse faire* hands-off approach. At the first extreme the manager has a greater reliance on the use of authority. **Decisions are made** without the involvement of staff, and then **announced**. This is a highly directing approach and may be appropriate in certain situations. For example, there is little room left for discussion if a decision is made to stop a production line and allocate staff elsewhere. At other times, a decision is best ***sold*** to staff. For example, a manager could make a decision to run a production line into over-time but is reliant on the willingness of staff.

7.2 Another example of a management style that relies on the exercise of authority is where ***ideas are sought*** after a decision has been presented. For example, a manager might take the decision to re-locate equipment and then seek ideas for a better alternative place from the team. A step towards greater involvement of and freedom for staff is where a manager puts forward a ***suggestion*** and encourages discussion. This is a useful approach for managers when an idea is still being developed



7.3 The area of freedom for staff increases where there is greater staff involvement in the decision-making process; this occurs when the ***situation is presented and suggestions invited***. Here, the manager does not suggest but instead simply describes the issue or situation and invites suggestions from staff. This approach has the potential to unlock creative suggestions. With further encouragement and within ***defined boundaries*** a manager might even seek a solution from the team.

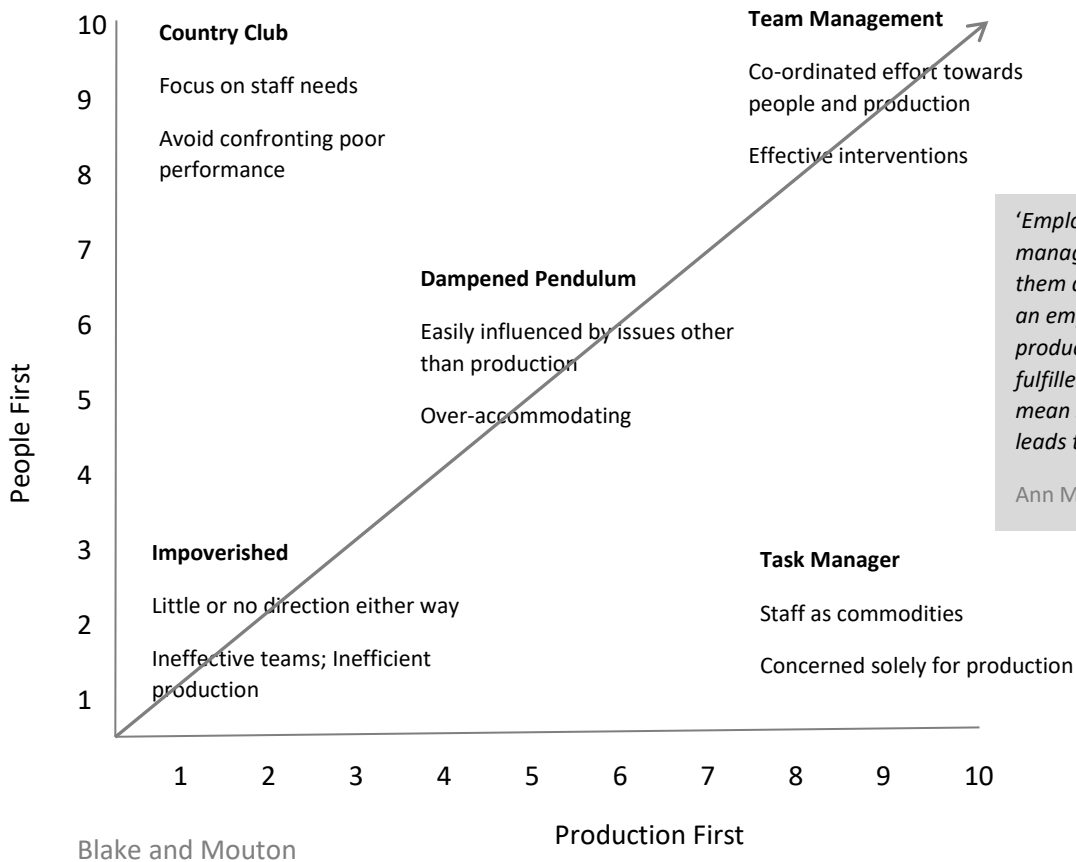
7.4 The greatest area of freedom for staff is where a ***manager defines the outcome*** and allows the team to decide on the best way to achieve it. Clearly, the manager remains accountable, but ***authority and responsibility are delegated***. Furthermore, through delegating, the manager frees up time and so can focus on other tasks.

Activity 7.1 Delegation

Identify two tasks where it is possible for you to define the Outcome and delegate.	Activity7.1
<p>Task 1</p> <p>In order to delegate the task effectively, what is the first thing you need to do now? What barriers can you anticipate, and how can these be removed? What additional support will be required?</p>	
<p>Task 2</p> <p>In order to delegate the task effectively, what is the first thing you need to do now? What barriers can you anticipate, and how can these be removed? What additional support will be required?</p>	



8 Management Styles - People and Production



'Employees who believe that management is concerned about them as a whole person, not just an employee, are more productive, more satisfied, more fulfilled. Satisfied employees mean satisfied customers, which leads to profitability.'

Ann M Mulcahy

8.1 You have probably experienced different management styles throughout your working career so far. Looking at the table above you will be able to recognise some characteristics of your own style.

8.2 Most would agree that **Team Management** is the most desired style, **balancing management techniques and leadership qualities**, (more on this later). However, an experienced manager might deliberately decide to adopt Country Club or Task Manager styles depending on the given situation (although probably not an impoverished or dampened pendulum style).



Activity 8.1 Management Styles

What are the advantages and disadvantages of each of the management styles? There are no right or wrong answers. This activity is designed for reflective practice and self-discovery.		Activity 8.1
	Disadvantages	Advantages
Impoverished		
Country-club		
Dampened Pendulum		
Task Manager		
Team Management		



9 Leadership Styles

Marturano

9.1 The interaction between leaders and staff is greatly influenced by the style of leadership of those in authority. These styles can be described as transactional and transformational.

9.2 **Transactional leadership** is about **the exchange of some kind of reward** for the work being done. Common rewards are pay, time off, longer breaks or easier tasks. The transactional leader **is more likely to resort to the early threat of disciplinary action** as a sanction for poor performance. This style is associated with **a focus on short-term targets and Key Performance Indicators (KPIs)**, rather than examining underlying factors. A transactional leader relies on **tight control, formal structures and processes** within the company. In order to get tasks done the transactional leader **'tells'** rather than explains, and **'directs'** rather than coach. This type of leader is likely to be **task orientated**.

9.3 The approach of a **transformational leader** is focused on the **'hearts and minds'**. Transformational leaders seek to achieve **buy-in** from others so that they become **engaged** in meeting targets. This style also considers the **motivation and job satisfaction** of staff. A transformational leader adopts a **supportive and facilitating** role, **trusting** staff to get on with the job with much less direct control. In order to get tasks done the transformational leader supports and empowers staff.

9.4 These descriptions are extremes. You might have a preference but probably recognised a bit of both characteristics in your own style of leadership. **The most effective manager will have elements of both characteristics and be able to switch between them depending on the person, team or the situation.** There are times when it would be more appropriate and beneficial in the longer term to support and develop staff, and there are other times where a directive approach would be more suitable. So far as the motivation of individuals is concerned, managers will know which style of leadership is most effective.





Activity 9.1 Own Leadership Style

Take this moment to consider your own style of leadership. Reflecting on your experience, where would you place yourself on the scales:

Activity 9.1

Transactional Leader

Most Unlike	Some similarity	Many similarities	Most Like
-------------	-----------------	-------------------	-----------

Transformational Leader

Most Unlike	Some similarity	Many similarities	Most Like
-------------	-----------------	-------------------	-----------

Briefly note, or mind-map:

Thinking of an event where your own reaction was not as productive as it might have been, what part did your leadership style play?

Now thinking of an event where a successful outcome was achieved, what part did your leadership style play this time?



Activity 9.2 Management, Leadership, Role (MLR)

You will have noticed that the terms Management and Leadership have so far been used inter-changeably. However, while often used this way, this use disguises key differences between the functions. This case-study looks at those differences.

Activity 9.2

On the left are some features of either Management or Leadership. Consider each and link them to the relevant box:

Skills

Qualities

Ideas

Products

Emotional

Inventory

Charismatic

Uncharismatic

Unemotional

Rota

Values

Schedules

Belief

Buy-in

Administration

Vision

Logistics

Management

Leadership

9.5 Next, we are going to explore the Management, Leadership Role (MLR) model. On doing so, without being guided beforehand, you will probably discover the elements you assigned to each box in the Activity mostly correspond.

9.6 Later we will look at some case-studies that highlight the differences. However, it is always useful to remember that the terms are often used inter-changeably.



Activity 9.3 The MLR Model

Follow this link to an online presentation that builds [‘The MLR Model’](#)

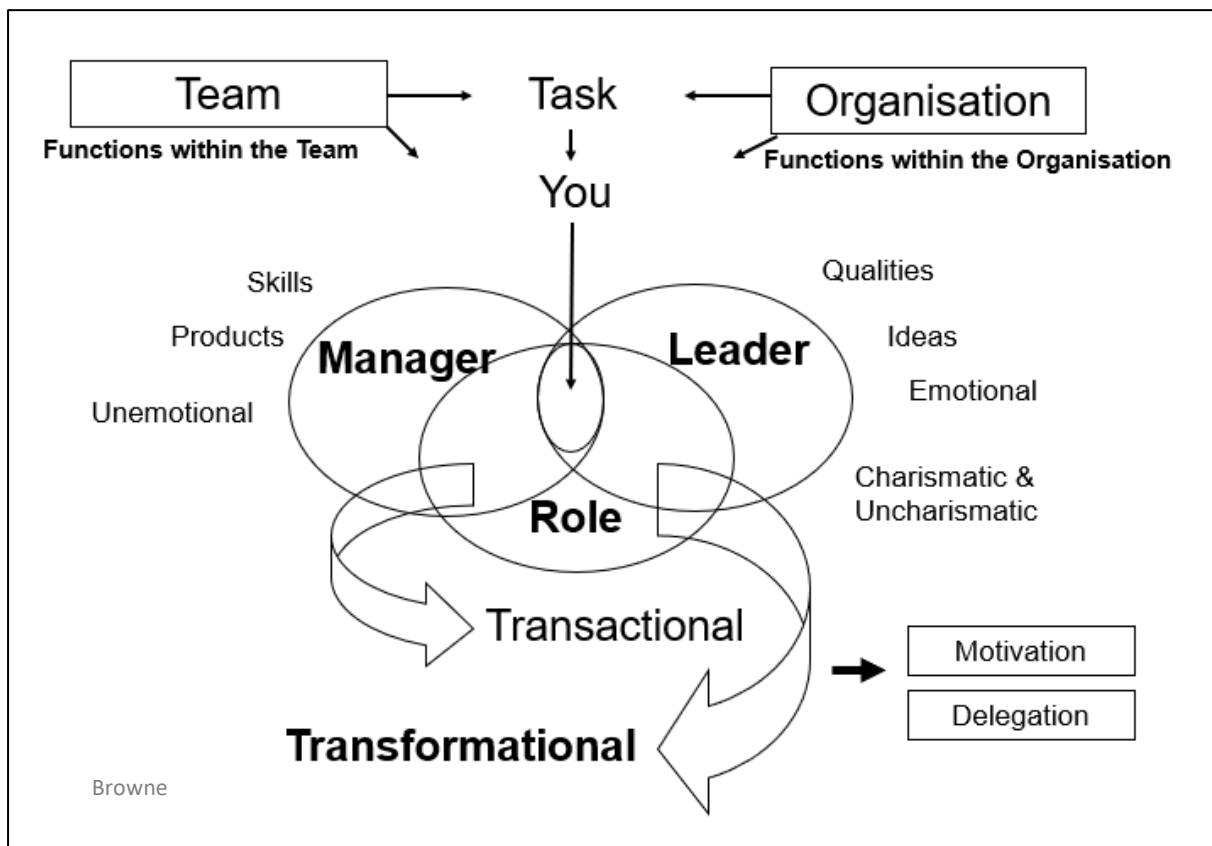
www.slideshare.net/DavidBrowne72/the-mlr-model

Activity 9.3

1. Give an example of a situation where your role requires you to use your management skills.

Why is that the best approach?

2. Give an example where leadership qualities are most required. Why is leadership more important in such circumstance?





10 Situational Leadership

10.1 The leadership style adopted is **influenced by the development stage of the member of staff or team**, who will naturally move from Development Stage 1 to Development Stage 4 given the right support. Each stage measures the competence, confidence and motivation of staff. Managers are expected to adopt the most appropriate leadership style depending on the situation: **Directing, Coaching, Supporting or Empowering**. New equipment or procedures, changes to legislation are examples of events that could cause a member of staff to move back along the stages, where a decision on the most appropriate approach is needed.

10.2 **Directing**. The Team Manager **'tells'** staff exactly what to do, giving clear boundaries and expectations. The learner or member of staff is provided with clear instructions on what is required. This style is also appropriate when clear, concise and unambiguous instructions are required. 'Directing' need not be abrasive or authoritarian, but rather a means of issuing instructions effectively.

10.3 **Coaching**. This style requires much more interaction between the manager and teams, or individual members of staff. Coaching is often based on a series of questions posed to the learner. The questions are designed to guide the learner to points of discovery through reflection and practice. Often referred to as a more 'Socratic' approach, coaching may require the learner to challenge their own perceptions of the workplace and their own abilities. A coaching style is an effective way of improving motivation.

10.4 **Supporting**. When a satisfactory level of competence has been reached, the manager may decide to step back and support staff as necessary. Again, depending on the situation this style is an effective way of boosting the confidence of staff and teams. There is an increase in staff **'participating'** in decision making or problem solving. However, the direction of team and individual staff effort is still decided by the Team Manager.

10.5 **Empowering**. While accountability for operations remains with the manager, appropriate degrees of authority and responsibility may be **delegated** to individuals and teams. When a manager **'empowers'** a member of staff he or she is then free to develop others.



Directing, Coaching, Supporting, Empowering

Directing Telling D1	Coaching Questioning D2	Supporting Participating D3	Empowering Delegating D4
Low competence	Low/medium competence	Medium/high competence	High competence
Variable confidence	Low confidence	Variable confidence	High confidence
Variable motivation	Variable motivation	High motivation	High motivation

Hersey and Blanchard (Adapted)

Activity 10.1 Apply Situational Leadership

Consider four future events regarding staff development and make notes on which style of Situational Leadership you might adopt- and why.	Activity 10.1
Event 1	
Event 2	
Event 3	
Event 4	



11 Building Teams

11.1 **Forming** a team involves identifying people with the relevant skills or knowledge. A further consideration is the learning style (Honey and Mumford) of individuals. Activists are good at brainstorming and getting straight into tackling issues. Pragmatists are also good at problem solving, always trying to relate whatever is being discussed to the workplace.

11.2 A team tasked to examine statistics or patterns in Key Performance Indicators (KPIs) should include at least one Theorists. Reflectors are good at task analysis as this involves observation and consideration; time to think. The duration of a team is another factor to consider. Ad-hoc teams formed for a short time only will not require the same level of organisation and boundaries as those formed for greater periods.

11.3 **Storming** describes the activities of a team where ideas are discussed and tested. All members of the team should be aiming for a Win/Win. However, managers will need to manage the contribution of individuals to ensure any discussion is not hijacked by the stronger personalities in the team. Roles and responsibilities are allocated, and professional relationships established during this phase of team building.

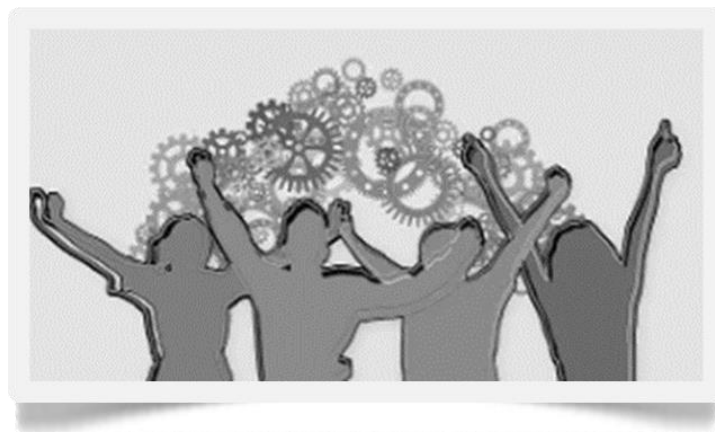
11.4 **Performing** is the stage where strong, supportive professional relationships bond the team together. A team identity is established and energy is focused on the task. Formal structures become less important as the team becomes self-supporting.

11.5 **Norming** is the strengthening of those roles, responsibilities and relationships. This is when the team becomes focused and more cohesive. The team function is normalised, as are expectations.

11.6 **Mourning** is an additional phase where a team is broken up, either planned or unplanned. An unplanned breaking up might be the result of a strategic change of direction. A planned breaking up might be the result of a project ending. To borrow from a song, *'breaking up is hard to do'*. This often-over-looked phase of the Team Function requires equal levels of attention

Forming	Storming	Norming	Performing	Mourning
----------------	-----------------	----------------	-------------------	-----------------

Tuckman and Jensen





The Eight Team-Roles

Belbin

11.7 Ideally, you will be part of a team that is functioning well. What we will go on to explore here are the various roles recognised within teams. As each role is described think about your own role, now, in the past and for the future.



Co-ordinator

11.8 This role is one of presiding over the team and co-ordinating its efforts to meet external goals and targets. Focused on achieving objectives but doing so by knowing each team member's strengths, weaknesses and trying to use each member as effectively as possible in achieving the team's objectives. They encourage everyone to contribute and impart a sense of purpose to the team.

11.9 Co-ordinators are usually of above average intelligence but not outstanding creative thinkers. They talk easily, are easy to talk to and are good listeners. They will set the agenda and control group discussions, but without being domineering.

11.10 They will listen, sum up group feelings, spell out group verdicts and, if a decision has to be taken, will accept it after everyone in the team has had a say.



Shaper

11.11 This role is that of concentrating on pushing the task through to completion. This role is an alternative to the Co-ordinator type of leader, and a team needs one or the other, not both. Shapers are better than Co-ordinators when a team needs a leader to push people into action, to galvanise them. Otherwise, the Co-ordinator type will usually lead a team to produce better results.

11.12 Shapers are full of nervous energy: emotional, compulsive, impatient and easily frustrated. They enjoy and welcome challenges, are often argumentative, and can be quick to sense a slight, or feel there is a conspiracy against them.

11.13 They will usually put forward more ideas than the Co-ordinator and will try to unite ideas, objectives and practical considerations into a plan for decision and action.

11.14 They are often seen as arrogant and abrasive and have a tendency to *steamroller* other members of the team. But they do make things happen.

Innovator (Plant)

11.15 This is the major creative role in the team: the source of ideas, suggestions and proposals, often distinguished by their originality.

11.16 Effective Plants are likely to be the most intelligent and imaginative members of teams. They concentrate on major issues, seeing new lines of approach, but often miss out on detail and make careless mistakes.

11.17 They can be uninhibited at times, prickly, and may cause offence to other team members by the way in which they criticise ideas. Conversely, they are bad at accepting criticism. They may also shoot off at a tangent on ideas that catch their fancy, but that do not contribute to team objectives.

Monitor-Evaluator

11.18 This role is that of the team's critic, carrying out a measured and dispassionate analysis of the team's ideas and proposals. Although unlikely to come up with a creative proposal, the Monitor-Evaluator is the one likely to prevent the team committing itself to misguided action.

11.19 Effective Monitor-Evaluators are perceived to be of high intelligence with skills in assimilating, interpreting and evaluating large volumes of complex material. Sometimes their evaluations are delivered tactlessly and disparagingly, which can dampen team members' morale while making Monitor-Evaluators unpopular.

11.20 They are generally not ambitious, although they can be competitive, and typically lack warmth, imagination and spontaneity. However, they are solid, dependable, and rarely wrong in their judgments.



Implementer

11.21 This is the role of turning decisions into defined and manageable tasks for people to do. The emphasis is on what is feasible: the logical extension of the objective into an achievable plan. This is an essential role for team effectiveness.

11.22 Implementers are noted for their sincerity, integrity and tenacity, and have a disciplined approach to their tasks. What upsets them is the sudden change of plan: because they like stable structures, they tend to flounder in quickly changing conditions. Sometimes a little inflexible, but usually prepared to adapt their proposals to meet agreed plans and procedures.

11.23 If anyone in the team does not know what has been agreed, or what is to be done, it is the Implementer that will be able to provide the answer.

Resource Investigator

11.24 This is the role that liaises with those outside the team, collecting information, ideas and exploring new possibilities in the outside world. These stimulate ideas and innovation, but not with the same originality as the Plant.

11.25 Resource Investigators are probably the most likeable team members. Relaxed, sociable, with a positive, enthusiastic outlook. Drawbacks are their tendency to lose interest and to spend too much time on irrelevant matters. They can also become bored, demoralised and ineffective if not part of a team.

Team Worker

11.26 Probably the most supportive role in the team. A good listener who helps and encourages others, building on their ideas rather than demolishing them or producing rival ideas.

11.27 Team Workers are the cement of the team. They are sensitive to the needs of others, perceive emotional undercurrents, and strive to produce unity and harmony within the team. An excellent counterbalance to the friction sometimes caused by the Shaper or the Monitor-Evaluator.

11.28 Not usually competitive and may even be seen as soft and indecisive. But they have a noticeable effect in times of stress and pressure.

Completer Finisher

11.29 The one who is not content until every 'i' has been dotted and every 't' crossed. Not at ease until a personal check on every detail has been carried out, that nothing has been overlooked. The perfectionist.

11.30 Completer Finishers are not assertive but maintain a sense of urgency which galvanises others into activity. They are self-controlled but apt to be impatient with more casual members of the team who are not so compulsive about meeting deadlines and doing things properly. Completer Finishers are important assets to a team provided they do not get bogged down in detail and lower the morale of other members of the team.



Team Role Personal Traits

Activity 11.1 Own Team Role Trait

Highlight the traits in the table to identify your team role.		Activity 11.1
CH Co-ordinator	SH Shaper	
Stable Dominant Extrovert	Anxious Dominant Extrovert	
IN Innovator	ME Monitor Evaluator	
High IQ (particularly on critical thinking) Reserved	High IQ Stable Introvert	
IM Implementer	RI Resource Investigator	
Stable Controlled	Stable Extrovert	
TW Team Worker	CF Completer Finisher	
Stable Extrovert Low in dominance	Anxious Introvert	





Activity 11.2 Team Roles at the Workplace

An opportunity for Reflective Practice:	Activity 11.12
<p>Review 1. Thinking about a team you are going to form in the future, who will be part of that team, and why? What are you expecting them to contribute?</p>	
<p>Review 2. Thinking about a current team, what characteristics reside within the team? What is your role in maintaining the team?</p>	

11.31 A further thing for a manager to consider is their own role in team building. As well as selecting the right people the manager needs to be Directing at the Forming, 'telling' the team and keeping tight control. During the Storming phase a manager can take a more Coaching approach, giving individuals guidance and advice as necessary. The team manager can step back and take a more Supporting role during the Norming phase, participating only when necessary. During the performing phase the manager may delegate more responsibility and authority, Empowering the team.



Team-Roles Inventory

Activity 11.3 Inventory Questionnaire

This questionnaire is designed to help you find out your roles when working as part of a team. There are seven 'questions' and each is followed by eight statements.

Activity 11.3

11.32. For each question you should select the statements that sound most like you. Then allocate a total of 10 points across the statements you have selected according to how applicable you think each statement is to you.

11.33 In an extreme case you may allocate all 10 points over all 8 statements. More typically, you will want to give points to, say, 3 or 4 rather than all the statements. For example: 2, 3, 3, 2 and 4 zeroes; or 6, 3, 1 and 5 zeroes. You will need to ensure the points allocated total 10 for each question.

What I believe I can contribute to a team:

No.	Points	Statement
1.1		I think I can quickly see and take advantage of new opportunities
1.2		I can work well with a very wide range of people
1.3		Producing ideas is one of my natural assets
1.4		My ability rests in being able to draw people out whenever I detect they have something of value to contribute to group objectives
1.5		My capacity to follow through has much to do with my personal effectiveness
1.6		I am ready to face temporary unpopularity if it leads to worthwhile results in the end
1.7		I can usually sense what is realistic and likely to work
1.8		I can offer a reasoned case for alternative courses of action without introducing bias or prejudice

If I have a possible shortcoming in teamwork, it could be that:

No.	Points	Statement
2.1		I am not at ease unless meetings are well structured and controlled and generally well conducted
2.2		I am inclined to be too generous towards others who have a valid viewpoint that has not been given a proper airing
2.3		I have a tendency to talk too much once the group gets on to new ideas
2.4		My objective outlook makes it difficult for me to join in readily and enthusiastically with colleagues
2.5		I am sometimes seen as forceful and authoritarian if there is a need to get something done
2.6		I find it difficult to lead from the front, perhaps I am over responsive to group atmosphere
2.7		I am apt to get too caught up in ideas that occur to me and so lose track of what is happening
2.8		My colleagues tend to see me as worrying unnecessarily over detail and the possibility that things may go wrong



When involved in a project with other people:

No.	Points	Statement
3.1		I have an aptitude for influencing people without pressurising them
3.2		My general vigilance prevents careless mistakes and omissions being made
3.3		I am ready to press for action to make sure that the meeting does not waste time or lose sight of the main objective
3.4		I can be counted on to contribute something original
3.5		I am always ready to back a good suggestion in the common interest
3.6		I am keen to look for the latest in new ideas and developments
3.7		I believe my capacity for judgment can help to bring about the right decisions
3.8		I can be relied upon to see that all essential work is organised

My characteristic approach to group work is that:

No.	Points	Statement
4.1		I have a quiet interest in getting to know colleagues better
4.2		I am not reluctant to challenge the views of others or to hold a minority view myself
4.3		I can usually find a line of argument to refute unsound propositions
4.4		I think I have a talent for making things work once a plan has to be put into operation
4.5		I have a tendency to avoid the obvious and to come out with the unexpected
4.6		I bring a touch of perfectionism to any job I undertake
4.7		I am ready to make use of contacts outside the group itself
4.8		While I am interested in all views, I have no hesitation in making up my mind once a decision has to be made

I gain satisfaction in a job because:

No.	Points	Statement
5.1		I enjoy analysing situations and weighing up all the possible choices
5.2		I am interested in finding practical solutions to problems
5.3		I like to feel I am fostering good working relationships
5.4		I can have a strong influence on decisions
5.5		I can meet people who may have something new to offer
5.6		I can get people to agree on a necessary course of action
5.7		I feel in my element when I can give a task my full attention
5.8		I like to find a field that stretches my imagination



If I am suddenly given a difficult task with limited time and unfamiliar people:

No.	Points	Statement
6.1		I would feel like retiring to a corner to devise a way out of the impasse before developing a line
6.2		I would be ready to work with the person who showed the most positive approach
6.3		I would find some way of reducing the size of the task by establishing what different individuals might best contribute
6.4		My natural sense of urgency would help to ensure that we did not fall behind schedule
6.5		I believe I would keep cool and maintain my capacity to think straight
6.6		I would retain a steadiness of purpose in spite of the pressures
6.7		I would be prepared to take a leading role if I felt the group was making no progress
6.8		I would open up discussions with a view to stimulating new thoughts and getting something moving

With reference to the problems to which I am subject when working in groups:

No.	Points	Statement
7.1		I am apt to show my impatience with those who are obstructing progress
7.2		Others may criticise me for being too analytical and insufficiently intuitive
7.3		My desire to ensure that work is properly done can hold up proceedings
7.4		I tend to get bored rather easily and rely on one or two motivated colleagues to inspire me
7.5		I find it difficult to get started unless the goals are clear
7.6		I am sometimes poor at explaining and clarifying complex points that occur to me
7.7		I am conscious of demanding from others the things I cannot do myself
7.8		I hesitate to get my points across when I run up against real opposition





Activity 11.4 Questionnaire Results

Transfer your scores by putting each score by its corresponding number on the questionnaire. Then total the eight columns. These eight totals should add up to 70.

Activity 11.4

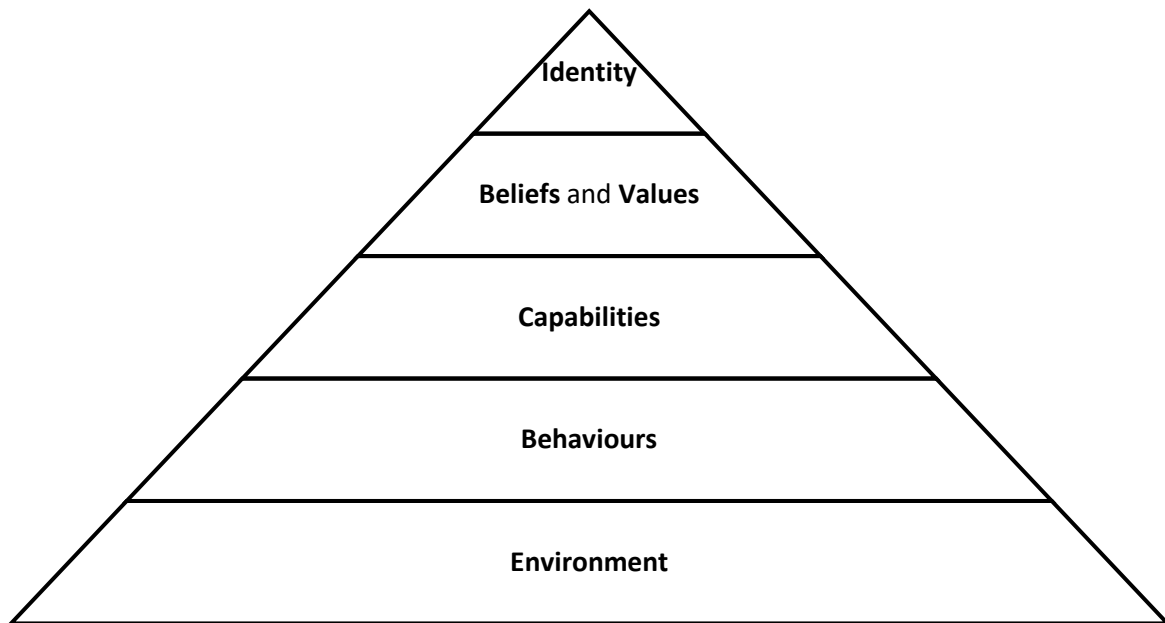
1.7		1.4		1.6		1.3	
2.1		2.2		2.5		2.7	
3.8		3.1		3.3		3.4	
4.4		4.8		4.2		4.5	
5.2		5.6		5.4		5.8	
6.6		6.3		6.7		6.1	
7.5		7.7		7.1		7.6	
Total IM		Total CH		Total SH		Total IN	

1.1		1.8		1.2		1.5	
2.3		2.4		2.6		2.8	
3.6		3.7		3.5		3.2	
4.7		4.3		4.1		4.6	
5.5		5.1		5.3		5.7	
6.8		6.5		6.2		6.4	
7.4		7.2		7.8		7.3	
Total RI		Total ME		Total TW		Total CF	

Your profile:	
----------------------	--



12 Dilts' Neurological Levels



12.1 **Environment:** Where / What environment?

Within the context of this model, we are talking about the personal and workplace environment and how you perceive yourself in it. Depending upon your circumstances and how you represent the world to yourself, you will fall somewhere within a range of keeping those two elements distinctly separate or indistinguishably linked. Most people would fall within that range and depending upon circumstances, will move within that range over time.

12.2 **Behaviours:** What behaviours?

This area is concerned with how we choose to interact with others. If controlled by the mind we may be directed by ego, finding the journey to be a series of transactional interactions with those around us. If the ego is not in control and instead a higher level of consciousness is operating within and directing behaviours, then our interactions with others are likely to be more mutually beneficial.

12.3 **Capabilities:** What Skills?

People need to be taught the skills and knowledge necessary in order to carry out tasks. In addition, the desired aptitude should be developed.

12.4 **Beliefs and Values:** What is important? What do I / we believe?

Here is where there is great potential to achieve amazing results if the beliefs and values held are aligned and compatible with those around us, at home and at work. However, here there is great potential for tension and conflict where beliefs and values clash.

12.5 **Identity:** Who am I / are we?

Are we a society or a coincidence of individuals? Am I my brother's keeper? How you associate will have a considerable bearing on who you think you are. This is, clearly, a deep philosophical question and one outside of the purpose of this PAM. Here, we just need to acknowledge that there are as many different perceptions on identity as there are people.



Activity 12.1 Operating level

Opportunities and strengths

This activity is an opportunity for you to take some time to reflect on your perceptions of the workplace (and social, personal) environment and how effectively you interact within it.

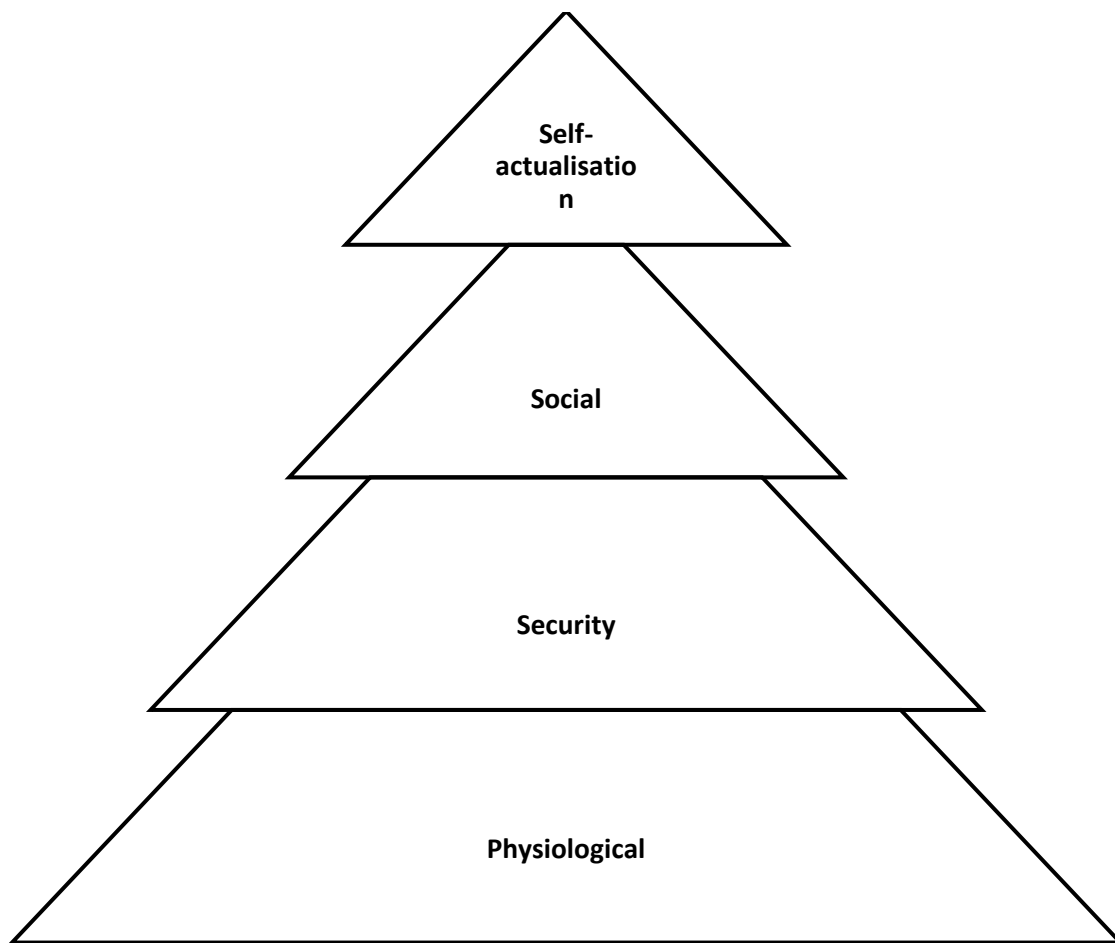
Activity 12.1

Thinking about some of the challenges you face, where do they sit within the neurological levels?
What can you do to resolve or overcome these challenges?

Where are your strengths? How are you going to exploit your own strengths?



13 Motivation - Hierarchy of needs



13.1 One of the most recognised models used to illuminate different aspects of motivation is Maslow's 'Hierarchy of needs.' The model provides a useful tool for understanding factors that could affect own motivation and the motivation of staff and teams.

13.2 The hierarchy of needs are usually represented as a pyramid where, starting at the base of the pyramid, specific individual needs are met before moving to the next in the hierarchy.

13.3 The first needs are the **physiological** (or basic) needs such as air, water, food and shelter. These needs are essential to survival and must be met. The next in the hierarchy is **security** (or safety). People need to feel free from external threat, or fear of threat. Unfortunately, and at every level in society, insecurity is a significant source of conflict.

13.4 **Social** needs (or companionship and love) are about colleagues, friends and family. Even the most internally referenced individual will at times seek out others in order to fulfil these needs. Needs around **self-esteem** are centred on the ego, on a person's sense of self-worth. As well as pride, other things such as self-respect and a sense of status (or status anxiety) are part of self-esteem.

13.5 **Self-actualization** (or fulfilment) is the highest need; it is the realisation of personal aspirations and achievements, of self-satisfaction and genuine appreciation and regard for others. Having reached the stage of self-actualisation a person is free from the burdens of everyday existence and instead enjoys a more fulfilling life.



13.6 Maslow's 'Hierarchy of needs are commonly expressed as above, a pyramid. This can be misleading as it suggests that the lower needs can be ignored once attained. However, needs met previously could be undermined by life events (such as illness or some other sudden misfortune) and so need to be addressed again. For instance, irrespective of how successful a person is at work, an unforeseen or unexpected event could adversely affect any of the lower needs and so be a huge distraction until resolved.

Activity 13.1 Motivation

<p>Consider a period in your life where things might have been difficult for you and relate the situation to Maslow's 'hierarchy of needs'.</p> <p>Maslow's 'hierarchy of needs' may be applied to individual staff or to teams. How can you improve the performance of a member of staff or a team? What is your assessment of needs not met and what can you do about it?</p>	<p>Activity 13.1</p>

14 Motivation - and Job Satisfaction

14.1 What causes satisfaction or dis-satisfaction at work? Research has been carried out that highlights some of the areas managers might pay attention to. The research was limited in that it involved a narrow sample group. Those selected to take part were students from North American universities and so cannot be considered representative of wider society.

14.2 However, the research provokes thought about what causes dis-satisfaction at work and so can help the manager to alleviate those factors where possible. The manager is also led to consider factors that enhance job satisfaction.

14.3 What stands out is that motivators, those things that increase satisfaction at work, are not the directly opposite those that cause people to be dis-satisfied. For instance, 'Company policy and administration' causes significant dis-satisfaction. However, removing the need for such odious compliance does not add to satisfaction. And at the other end of the scale, a sense of 'Achievement' provided most job satisfaction.



Activity 14.1 Job Satisfaction questionnaire

Complete the following questionnaire to find the level of your own job satisfaction, (You probably have a good sense of this already).

Activity 14.1

Identify the:

- factors of the job that led to a **high** level of **dis-satisfaction**
- factors of the job that led to a **low** level of **satisfaction**

	Where: '1' I strongly disagree through to '4' I strongly agree							
	Dis-satisfaction				Satisfaction			
	4	3	2	1	1	2	3	4
Achievement								
Recognition								
The work itself								
Responsibility								
Advancement								
Growth								
Company policy and administration								
Supervision								
Relationship with superior								
Salary								
Relationship with peers								
Personal lifestyle								



Activity 14.2 Job Satisfaction comparison

Compare your own evaluation to that of research carried out into motivation and the workplace.

Activity 14.2

The motivation to work, sample.

	Factors of the job that led to extreme dis-satisfaction				Factors of the job that led to extreme satisfaction			
	Percentage Frequency							
	40	30	20	10	10	20	30	40
Achievement								
Recognition								
The work itself								
Responsibility								
Advancement								
Growth								
Company policy and administration								
Supervision								
Relationship with supervisor								
Work conditions								
Salary								
Relationship with peers								
Personal lifestyle (Not included)								

Herzberg

14.4 Based on Frederick Herzberg, 'The Motivation to Work.' While the sample group was limited (consisting of university students), for the purposes of The PAM Series (PAM 1) the survey still provides a basis on which the topic can be explored.



15 Locus of control

15.1 The locus of control is all about the degree to which a person believes they control events and make things happen; and the degree to which a person believes events control them and things happen to them.

15.2 Those with an **External locus of control** believe that their actions are shaped by other people and that their freedom to act is limited by forces they cannot influence. Rather than anticipating what could happen and taking preventative actions, this type is likely to be reactive to events.

15.3 Those with an **Internal locus of control** will have a sense that events can be shaped by their interventions, that things happen because of what they do. Such types have a sense they can influence events around them. There are many competing demands, and those with a strong Internal locus of control will more easily prioritise and focus only on what can be accomplished by them and inform others of what cannot.

15.4 A manager controls events in their department. However, they may have to operate within a framework, such as Leader Standard Work (or Daily, Weekly, Monthly routines), and there are expectations to carry out those management routines and accomplish tasks within such frameworks. Even so, managers still have considerable freedom of action.

Activity 15.1 'Internal' or 'External' locus of control

Respond to the following 10 questions 'True' or 'False' to identify whether you have an orientation towards an Internal or External locus of control.

Activity 15.1

Circle as required:

- | | |
|--|---------------|
| 1 I decide what happens in my department. | True or False |
| 2 I can manage upwards. | True or False |
| 3 If something goes wrong, I am empowered to put it right. | True or False |
| 4 Others give me direction on how to run my department. | True or False |
| 5 I rely on others so that I can achieve my plan. | True or False |
| 6 I receive instructions detailing what I must do. | True or False |
| 7 I liaise with others to achieve my plan. | True or False |
| 8 I receive information from management meetings. | True or False |
| 9 If something goes wrong, I need others to put it right for me. | True or False |
| 10 I provide information at management meetings. | True or False |

Activity 15.2 Exercising control

By completing the first Activity you may have identified an area that needs addressing. Make notes on what you can do to achieving your desired outcomes.

Activity 15.2

Internal locus of control: 1, 2, 3, 7, 10.



16 SMARTER Delegation

16.1 A key function of the manager is to delegate tasks. Some clear advantages of delegation are the development of individuals and teams; improved morale and increased motivation; more efficient use of time. However, poorly delegated tasks can have the opposite effect. It can breed a sense of being unfairly taken advantage of; lower morale and decrease motivation; be a poor use of time.

16.2 A useful aid to delegation is to be **SMARTER** about it. This allows for clarity for both the manager and the person or team being delegated to.

16.3 **Specific.** The task should be tightly defined so that no confusion arises.

16.4 **Measurable.** It should be easy to identify when the task has been completed. This can be achieved through visible 'Outputs' (physical results) or 'Outcomes' (non-physical results).

16.5 **Achievable.** The person or group receiving the delegated task has to have the capacity to be able to carry the task through to completion. There should also be sufficient resources in support. The delegated task will have to compete with normal operational routines and unexpected events. Therefore, a sense check will identify if the manager has a realistic expectation or otherwise.

16.6 **Relevant.** Every workplace has a finite amount of resources. Therefore, effort directed at any activity should contribute to company objectives and performance.

16.7 **Time-bound.** Giving the task a time limit allows for the task to be prioritised accordingly.

16.8 **Ethical.** Delegated tasks ought to carry with it a sense of fair play. Properly delegated tasks also illustrate good leadership.

16.9 **Recorded.** As good management practice, a record of the delegated task should be kept. For example, in a manager's 'Daily Log' or staff 'Personal Development Plan'.

16.10 The **social** aspect should be considered in order to help make a delegated task more acceptable. A team might complete a task to a higher standard and be happier while doing so, simply by being able to have a radio playing in the background, (although to some a radio would cause a distraction). Wherever possible, ownership should be delegated along with the task itself. Giving the person or team greater scope in exactly how the task is completed, and how the workplace is arranged, can improve overall satisfaction.

16.11 Exactly how much freedom can be given will depend on a range of factors such as levels of expertise and experience, (of the manager as well as the person or team being delegated to). Along with the **responsibility** for completing the task, the manager can also choose to delegate **decision-making authority**. The more transformational the management style and workplace environment, the more freedom to make decisions can be attached to the task. However, ultimate responsibility and authority will always remain with the manager.



Activity 16.1 The delegation of tasks

Think of a task (or group of tasks) that you could delegate:

What? Who? When? Where? Why? How?
How much decision-making authority can also be given?
Can Leader Standard Work be used?
Arrange a suitable time and place to delegate the task.

Activity 16.1

Your notes (The basis of your plan)



17 Conflict Resolution - The route to assertiveness

17.1 So far as conduct at the workplace is concerned, managers need to be assertive as they go about their tasks. Furthermore, managers would prefer to see assertive behaviour in others as this leads to an environment where everybody is seeking win-win solutions to situations. But what is it to be assertive? A good starting point in answering this is to identify what being assertive is not.

17.2 Assertiveness is *not* always about seeking (perceived) victories at all times. The **'I Win, You Lose'** is tiresome for others and often masks weaknesses in the person being aggressive; being an inappropriate response to difficult situations. Assertiveness is not about giving in too easily, **'I Lose, You Win.'** It is not helpful to personal development if individuals simply say, 'ok' to everything without questioning or contributing somehow. And finally, assertiveness is not about refusing to engage at all at work and withdrawing, **'I Lose, You Lose.'** Managers faced with that kind of behaviour need to act and re-engage those members of staff.

17.3 Assertiveness is about the application of techniques. A straight 'No' is likely to be perceived as unnecessarily blunt or aggressive. However, a lengthy justification of why you are saying 'No' may be perceived as weak. There are, however, some useful techniques available to help you achieve a successful **'I Win, You Win'** outcome.

The Assertiveness Grid

Aggressive or Manipulative I win, You Lose	Assertive I win, You Win
Withdrawal I lose, You Lose	Submissive or Passive I lose, You Win



Activity 17.1 Assertive responses

This activity consists of a series of scenarios. Read the scenario then respond to the question that follows. It would be more beneficial if you could associate the scenario to a real workplace situation.

Activity 17.1

1. Put your point of view across in a respectful, clear and concise way. If you do not have a point of view on an issue, then do not say it. Contributing when you are not clear yourself on where you stand is hardly going to help things progress. However, if you do have a point of view it can be stated in a short, direct sentence.

What is your view about an issue you are facing now?

2. Do your homework before tackling an issue by trying to imagine the situation from others' perspectives. Imagine being able to see things from the other person's point of view. You do not have to agree with it, just understand it better.

How might others perceive it, and what can you do to take this into account?

3. Learn to say, 'No' in an effective and professional manner. Here are two ways of saying, 'No'. Notice how the other person is left with an action:
'I'm afraid that won't be possible unless you...'
'It may be possible if you...'

How might you say, 'No' using this method?

4. Present alternatives. An alternative that is a 'Win-Win' has every chance of being accepted.

What alternatives could you present?

5. Do not personalise the situation. Not personalising events at work is harder to do for some people than others. It is natural to have a sense of personal involvement in what is happening around you. However, a level of detachment is a healthy trait and can assist a manager when a 'No' is required.

How are you going to make sure you do not personalise situations in the future?



18 Conflict Resolution - The route to consensus

18.1 A Win/Win is always desirable. However, the reality is that some form of compromise is likely to be involved where both parties have had to give some leeway. Compromise is perfectly acceptable so long as there is not a complete abdication of responsibilities, or issues aren't being side-stepped or deliberately avoided.

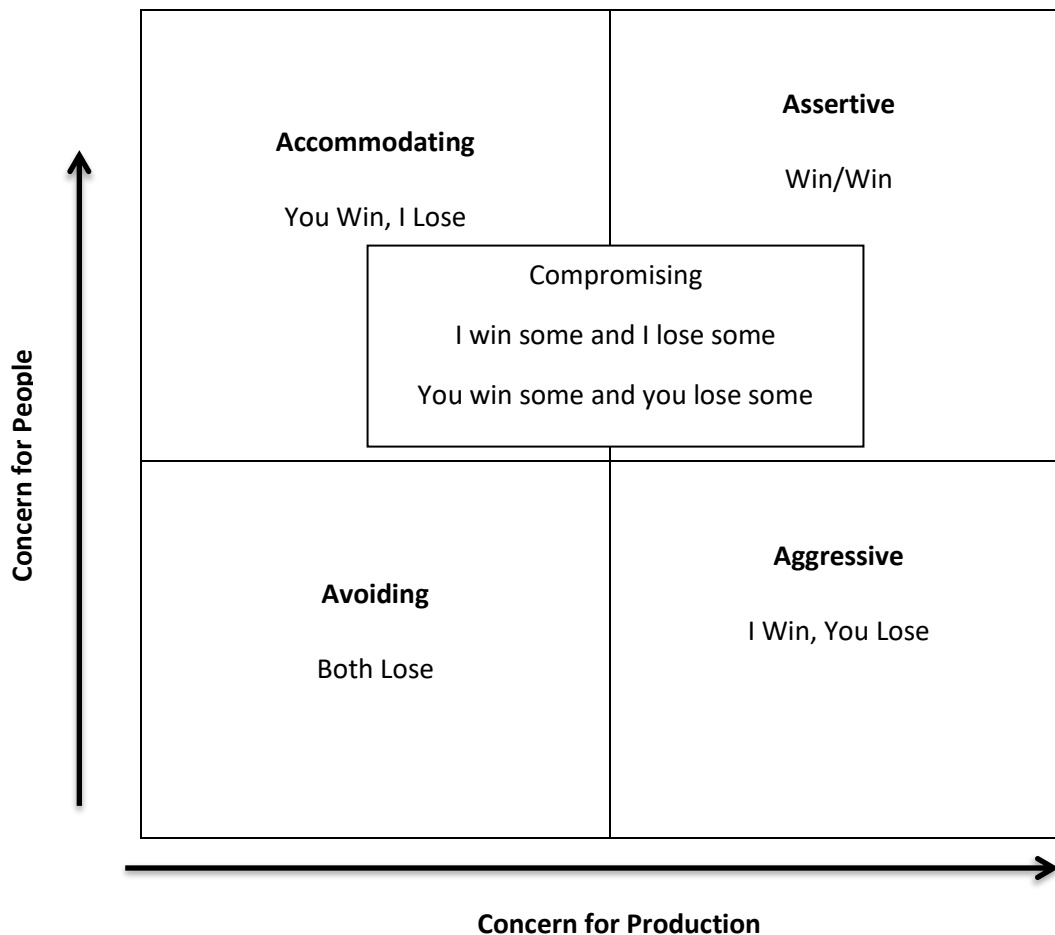
18.2 Managers who are comfortable with compromise, who can consider and respond to other people's perspectives, are more effective. A manager can remain principled and still be able to compromise: 'All compromise is based on give and take, but there can be no give and take on fundamentals.' Gandhi.

18.3 Furthermore, seeking a Win/Win while being able to compromise is a healthy attitude in any problem-solving situation. Rather than becoming an immovable object (that others will eventually ignore and move around), being able to compromise when tackling issues makes a manager much more effective.

18.4 There are some 'red line' or 'must haves' and 'must do' issues. However, even these can be challenged by the simplest of questions, 'Why?' What value does it add? How does it maintain or improve the process? Does it contribute to safety? And even if it does add value, improve the process or contribute to safety, can it not be done in an even more effective way?

18.5 Whatever topic these basic questions are aimed at is likely to involve some compromise. What matters is that any compromise leads to a sound solution.

The Consensus Grid





Activity 18.1 Outcomes Thinking

Identify a particularly difficult issue you are dealing with. Now apply Outcomes Thinking:

Activity 18.1

1. What is the problem? If you drill down by asking again, 'and why is *that* an issue?' each time you describe the event or situation, you will eventually arrive at *the real* issue.

2. What would be a desirable outcome? If you achieved that outcome would that solve the issue?

3. What needs to happen towards you achieving the desired outcome? What, When, Who, Why, How?

4. Check, how do you imagine the outcome?

What are the consequences?

What safety obstacles are there and how can they be removed?

What value is added, what potential improvements are there?

How is the process affected?

5. What is the single thing that needs to happen *now* towards achieving the desired outcome?



19 Feedback '360 Degree' Coaching

19.1 '360 Degree' coaching describes a development approach that is characterised by an equal relationship between the coach and the coachee. Adopting this approach has the potential to improve the feedback cycle, leading to an overall improvement in performance.

19.2 This approach to feedback is usually applied in the development of more senior personnel but is applicable at any level once the ground has been prepared. Those invited to participate in 360 Degree' feedback need to be coached in the first place in their role in the process.

19.3 Both parties to this type of feedback are required to accept ownership of highlighted areas and arrive at their own considered conclusions. Both are expected to engage in Reflective Practice and to appreciate others' perspectives. **Strengths, Weaknesses, Opportunities and Threats** are identified, and plans agreed to mitigate or exploit as appropriate. The deliberate identification and application of communication techniques would be a typical outcome from '360 Feedback'.

19.4 While this type of feedback is certainly **carried out face-to-face**, it is **supported by formal reports** that are expected to be included in the owner's Professional Development Plan.

The Principles of '360 Degree' Feedback

19.5 The **principles of '360 Degree'** coaching includes a **focus on the person being coached**. The coach adopts an enabling stance, encouraging and assisting the coachee to with decision making and planning. Another key principle is the association of this feedback to **succession planning**. '360 Degree' feedback is about the recognition and development of **talent** following a Socratic method of **self-discovery** and growth of **self-confidence**. The coach has a responsibility to develop the coaching relationship, building and maintaining **trust** and **belief**.

19.6 There is necessarily a high degree of **confidentiality** between both parties due to the principle of working on real workplace events and real issues. The person being coached ought to feel safe in the knowledge that their perspectives, when expressed, will be accepted with **respect** and **confidence**.

19.7 One other principle is to allow **sufficient time** for the feedback process to occur. This approach will not be effective if the interaction is sandwiched between pressing and distracting workplace events. The feedback opportunity should be **built into the routines** of the coach and coachee, (Daily, Weekly, Monthly (**DWMs**)) could be utilised here.

19.8 While largely based on data and Key Performance Indicators, '360 Degree' feedback requires the coachee to attempt to appreciate events from the **perspective of others** and to accept what others might think about them. This can be difficult as it would be natural to feel under attack and become defensive. Such a response can be anticipated and even brought into the feedback as a learning opportunity. This requires high levels of **empathy** from the coach and coachee.

19.9 The coach should encourage a mindset of **Outcomes Thinking**. This was explored in 'The Route to Consensus'. A balance is struck between what should be achieved and what can be achieved. **SMARTER** Objectives, used in the context of Delegation, can be useful here too.



Activity 19.1 '360 Degree' Guide

Establish and maintain a '360 Degree' feedback relationship.

Activity 19.1

1. Arrange a (first) feedback session where the principles are agreed. This becomes a form of contract:

Review performance, Data.
Consider the perspectives of others.
Draw conclusions.

3. Arrange a (follow up) feedback session (after a suitable period to allow time for reflection):

Identify areas for development.
Identify opportunities.
Identify good or exceptional performance.

4. Arrange a (development) feedback session (after a suitable period to allow time for planning):

Prioritise.
Identify a desired Outcome



20 Reflective Practice

20.1 This model for reflective practice can be used as a quick mental exercise requiring just a few moments, or a full and detailed review of events. You decide on the most useful application for your needs.

20.2 The simplicity of this model belies its potential: **What?** Describe the event or situation; **So What?** Identify new or refreshed insights and personal perceptions. **Now What?** What can be done and what will the consequences be? What? So What? Now What? (Rolfe *et al*).

20.3 The stages of the model can be visited as many times as necessary or useful until you are congruent about the consequences of what you have identified as your next action.

What? **Description** orientated reflection

So What? **Theory** orientated reflection

Now What? **Action** orientated reflection

Activity 20.1 Reflective Practice

Identify an issue or situation that you would like to reflect on now. Reflect on each area as many times as necessary until you are congruent about the consequences of what you have decided you are going to do.

Activity 20.1

1. What (Description orientated reflection)

is the problem, difficulty, reason for being stuck or for feeling bad?
was my role in the situation?
was I trying to achieve?
actions did I take?
was the response of others?
were the consequences for me?
were the consequences for others?
feelings did, does it evoke?

2. So What (Theory orientated reflection)

does this teach me?
does this imply or mean about me or others?
was going through my mind as I acted?

3. Now What (Action orientated reflection)

do I need to do in order to make things better, stop being stuck, feel better, get on better?
am I going to do next?
are the consequences of what I am going to do next, and am I happy with that?



21 Dealing with Pressure at Work

21.1 A degree of pressure is natural at the workplace. Some might say the right type of pressure is even desirable because, when properly applied, pressure can be an effective motivator. However, there is a point where too much pressure is utterly counter-productive as it results in a sudden and dramatic drop in performance; this is the **tipping point**. The tipping point is where stress can occur. This is where people talk of being 'stressed out'.

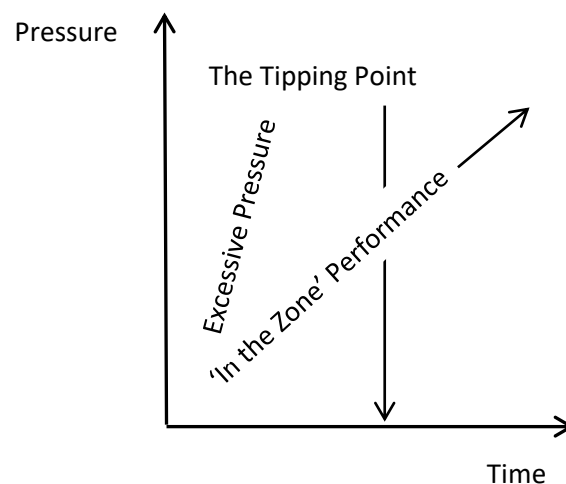
21.2 **Stress is quite different to pressure** in that stress has physiological effects on the body **and is never desirable** or something a manager would want to see at the workplace.

21.3 Another thing to consider is that the time to reach the tipping point will **vary between individuals**. There are many factors involved such as ability, resources and of course, personal circumstances.

21.4 Part of a manager's responsibilities is to ensure staff are able to carry out their tasks under the right conditions so that the tipping point is not reached, and staff are able to work at an optimum and sustainable rate.

21.5 When staff are working at an optimum and sustainable rate they are **working in the zone**. Staff are working within their **capabilities** and **given support**. Occasionally, people may be taken out of their comfort zones by events such as: a temporary surge in their workload, new ways of doing things, or training. However, with support and resources most people can carry on working effectively, then quickly return to working within the zone.

'In the Zone' Performance





Activity 21.1 Optimum work

You will have your own challenges and resource issues. Some of you may be less experienced and need more support. Some of you may have limited resources.

Activity 21.1

What steps can you take to ensure you continue to work at your optimum and in a sustainable way? This is another opportunity to practice Outcomes Thinking

1. What is the problem? If you drill down by asking again, 'and why is *that* an issue?' each time you describe the event or situation, you will eventually arrive at *the real* issue.

2. What would be a desirable outcome? If you achieved that outcome would that solve the issue?

3. What needs to happen towards you achieving the desired outcome? What, When, Who, Why, How?

4. Check, how do you imagine the outcome?

What are the consequences?

What safety obstacles are there and how can they be removed?

What value is added, what potential improvements are there?

How is the process affected?

5. What is the single thing that needs to happen *now* towards achieving the desired outcome?



22 The change environment

Limitations of the standard approach to change

22.1 **Change starts at the top.** Being further up the management ladder does not come with a magic skills-set of being able to arrive at all the best ideas; however, that is often the mind-set. Those closest to the work and the systems shaping the work are equally as likely to have the good ideas. Another problem with a top-down approach is that management culture can make it uncomfortable to speak truth to power (or authority). By the time a good idea is listened to the opportunity may well have passed by.

22.2 **Change is rolled out.** 'Here we go, yet another project' is a common enough reaction to change that has not considered or consulted with all those involved.

22.3 A change programme that is rolled out, or imposed, will meet resistance. A more socially constructed plan, where a framework is established, and owners operate according to their own plan for change is an effective alternative approach.

22.4 **Change is engineered.** An extension of rolling out change is to attempt to engineer it to too much detail. This transactional approach assumes change can be prescribed and the environment controlled. A more transformational approach is more inclusive, flexible, and potentially more radical. A **change platform** shares the characteristics of a transformational approach.

Options that challenge limitations

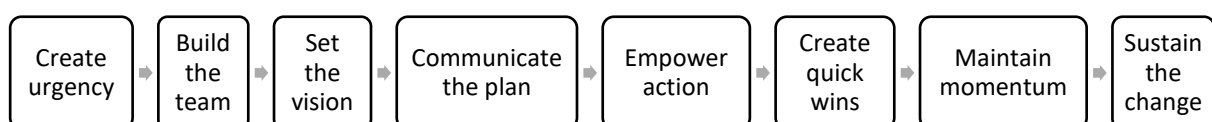
22.5 **From 'top-down' to 'activist-out'.** Change champions will lead the way.

22.6 **From 'sold' to 'invited'.** A sense of choice can ease transition.

22.7 **From 'managed' to 'organic'.** Empowerment builds mutual trust. Organic change is more likely to succeed, not least because the desire, the will, the passion is already theirs.

22.8 A successful change platform is one that, "...allows anyone to initiate change, recruit confederates, suggest solutions, and launch experiments..." A change platform happens in real-time and is socially constructed. Hamel and Zanini

Eight Steps to Change



Kotter



22.9 Characteristics of a change platform:

- Outcomes orientated
- Requires thoughtful planning and sensitive implementation
- Plans should be SMARTER
- Conducted in consultation
- Success more likely if driven from the bottom, up
- Has the potential to release hidden talent
- Involves all the people affected
- Cannot be forced
- Following a classic bell curve: Some will not want it; most go along with it; some will want to lead it

Activity 22.1 Building a change platform

Thinking about 'Eight steps to successful change', what actions can you take now? How do you have in place a real-time, socially constructed approach to change? How can you build a change platform?

Activity 22.1

1. **Create urgency.** Motivate people to action.
2. **Build the team.** Combine a balanced skills-set.
3. **Set the vision.** Apply 'Outcomes Thinking'.
4. **Communicate the plan.** Use multiple methods of communication.
5. **Empower action.** Remove obstacles, set up feedback loops, achieve objectives in short 'sprints'.
6. **Create quick wins.** Provide opportunities to experience empowerment and success.
7. **Maintain momentum.** Promote leadership qualities and management skills.
8. **Sustain the change.** Establish and maintain the new routines and practices



23 Leadership, Empowerment and Change

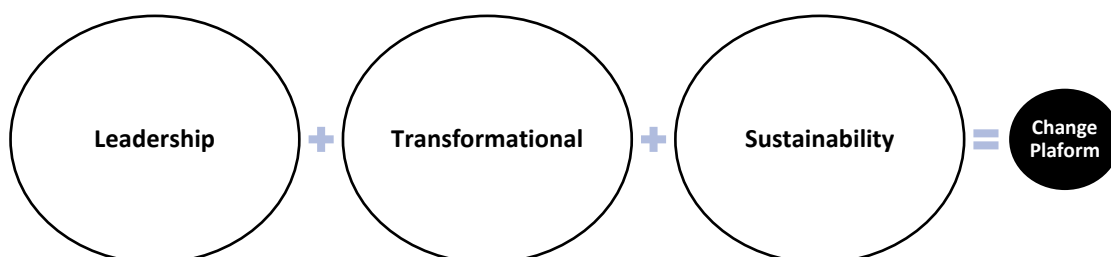
23.1 Here are three challenges for anyone considering leadership in a change environment. The first is to take **leadership** and pin it to a wall. Of course, it would not be possible to do that because leadership doesn't exist in such a way that would allow it; in one sense leadership is intangible. However, it would be possible to take the tools of management and pin them to a wall: tools such as registers, logs, documents, charts, graphs, forms etc; but leadership is different. Based on emotions rather than the physical, leadership is about ideas such as values, beliefs and vision.

23.2 The second challenge requires that a **transformational** approach be adopted, an approach where individual leadership qualities assure buy-in. There is change ahead; but rather than set about it in a top-down manner, teams can be empowered. Those in positions of authority can move away from the notion that the best ideas are generated from the top, and instead create a change platform, a framework that will involve everyone. From such a platform, people are invited to participate, and to do so willingly.

23.3 Within such an environment and whatever the change event, anyone can initiate an idea and put forward suggestions. Teams can be formed and supported as the ideas are tested. The task is to lead socially constructed change (Hamel and Zanini). Independent teams can interact with other independent teams as they set the priorities in their departments, identify barriers and generate imaginative and creative opportunities for improvement.

23.4 The third challenge is about **sustainability**. Inevitably, change is character driven. Initiatives are often seen to lose momentum when a person (not necessarily the manager) moves on. Part of empowering the team is ensuring the new way of doing things is embedded and fully embraced. The leaders' role in this is to become a **change enabler**, as well as a change agent as teams go through the stages of organisational change (Kotter).

23.5 This kind of approach represents a change from an environment where waste levels inherent within operations are accepted, to an environment where those waste levels are constantly being challenged. There is no monopoly on coming up with ideas or solutions to issues at the workplace. Teams are formed, supported and re-shaped as required. Ownership of the change has been delegated as much as is practical and new systems of work tested, which in time will become embedded.





Activity 23.1 Build a platform for change

What can you do to empower and support your team or teams? Consider your approach to leadership and the environment you might want to create.

Activity 23.1

You could make your objective/s SMARTER when considering what you can do to empower and support your team.

Specific, Measurable, Achievable, Relevant, Time-bound, Ethical, Recorded

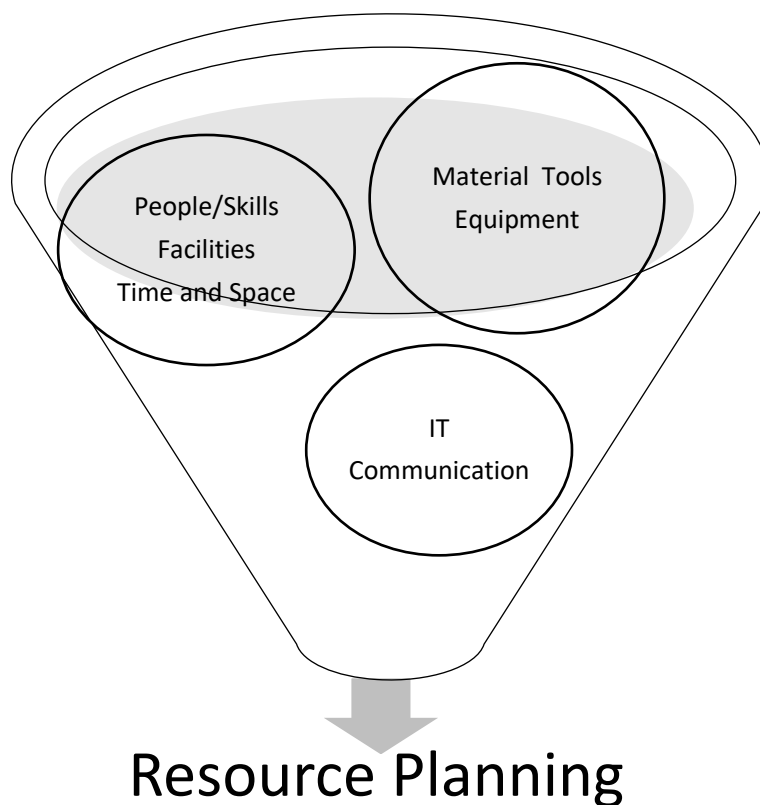
What is the next single thing you need to do?



24 Resource Planning

24.1 Let us start with the **outcome** of effective resource planning: **'The right people doing the right job, at the right time, in the right place, with enough space and with the right material, tools and equipment.'** Resource planning is about the **coordinated logistics** of different departments.

24.2 The right people need to be trained to the right level at the right time. The right job is one that meets the needs of the customer, scheduled properly at the right time as part of the workflow. The resource needs to be at the right place within the workflow and with sufficient space to allow efficient use. The right material, tools and equipment requires a through-life approach, with a robust **procurement, preventative maintenance** schedule and **disposal** practices.





Activity 24.1 Resource planning

As part of your planning considerations (for a current or future event), make notes on factors affecting resources:

Activity 23.1

SMARTER Objective. What has to be achieved? What? Why? Where? When? Who? How?

Needs assessment. What resources are needed in order to achieve the objective?

Availability. What resources are available, and when?

Logistics. How are the resources to be obtained, held, allocated, used and released after use?



25 Making a case to management (SWOT)

25.1 If you have a suggestion or recommendation to make to management, the chances of your idea being accepted are increased if it is presented in a format that is clear. When making your case you will have needed to have done your homework, or preparation, so that you have a good appreciation of what is happening. You need to be able to **describe the situation in an objective, factual way** and explain the issue or issues (and how it affects safety or Key Performance Indicators (KPIs)).

25.2 Once you have prepared the scene you should **present a proposal, or recommendation, from a range of options**. Each option should be presented as a SMARTER Objective, with each of these Objectives including a **SWOT analysis: Strengths, Weaknesses, Opportunities, Threats**. A SMARTER Objective with a SWOT analysis helps with the prioritisation, or the removal, of options.

25.3 A SWOT analysis also helps with the identification of areas that fall within the influence of the company, are **Internal** and those areas that are outside of the direct influence of the company, are **External**.

Process of making a case

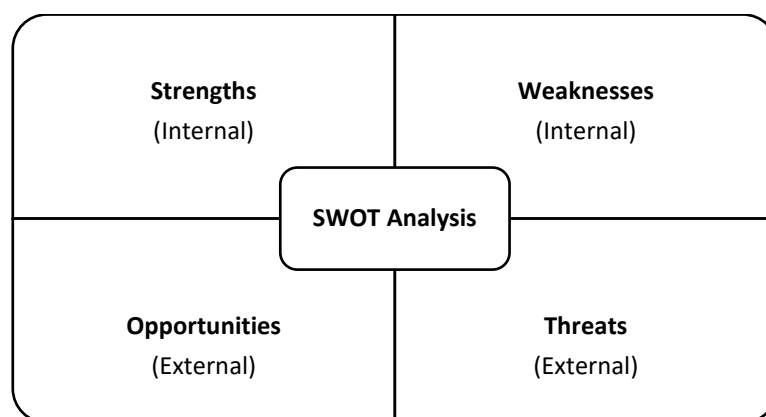
25.4 **Preparation:** Gather the latest information: figures, statistics, illustrations and relevant documents.

25.5 **Situation:** Describe the situation in an objective, non-judgmental, impartial way. (If you have an interest, declare it). A description of the situation should be concise otherwise it risks being perceived as a complaint.

25.6 **Issue.** You want your case to get the attention of management. Therefore, an explanation of the issue should highlight how, for example, safety, quality, KPIs and ultimately profit is being adversely affected.

25.7 **Options.** Presented as SMARTER Objectives

25.8 **Recommendation.** Your proposal, or recommendation, should deal directly with the issue. Is the issue removed, or have you limited the affects? Your recommendation should be derived from the SWOT analysis.





Activity 25.1 SWOT Analysis

Examine each of your options applying a SWOT analysis.

Activity 23.1

Option: _____

Internal

Strengths

Weaknesses

External

Opportunities

Threats



26 Reverse 'T' Review

26.1 The **Reverse 'T' Review** is a useful way of **identifying those activities at work that are having a bad effect on performance**, those own goals. The review leads to action to removing such activities.

26.2 Operations can be adversely affected by **unintended consequences of the actions or inactions of those involved**. Managers may inadvertently put in place structures, practices or routines that reduce effectiveness rather than improve it.

26.3 This quick, (fun), and easy-to-use tool highlights what people may be doing wrong, and triggers actions to put things right.

Process of a review

26.4 The first step is to give the review a **title**. Then, in the left-hand column make a **list of all the things you would do if you wanted to make a bad job of it**. It sounds odd but doing this often identifies some own goals being scored; you may find you are indeed doing these things. The final step is to **put in place an action plan to address any own goals** being scored.

26.5 A Reverse T Review can be a quick activity done individually, or as a more inclusive activity carried out as a group.

26.6 In the following example a Reverse T Review for the 'Arrival of new widget' has identified several areas that need attention:

Arrival of new widget	
Reverse: Do not tell anyone about the new widget Do not let people know the arrival date or time Make sure no one is designated to accept delivery Do not let Technical know (Inspection) Do not tell Engineers (Inspection) Do not allocate any storage space once delivered Do not prepare any paperwork	Action: Issue a brief Inform stakeholders about the arrival data and time Check the 'New Equipment' procedure is being followed



Activity 26.1 Own Reverse 'T'

Choose a topic from work and carry out a Reverse 'T' review.

Activity 26.1

Title:

Reverse:

Action:

A list extending to here may indicate a high risk.



27 Visual Management

27.1 PAM 1 has brought together some essential communication tools and methodologies which, in its entirety, is all about laying the foundations for successful communication within and between teams. This section outlines how to make that communication visual, and by doing so contribute to the even more effective management of the environment.

27.2 Visual Management **includes the whole range of signage, labels, tags, floor markings etc that is used around the workplace.** For example, an area might be marked off specifically for a certain piece of equipment. Or, certain routes to be taken to different areas might be indicated by coloured floor markings. **A classic Visual Management method used extensively in all sorts of circumstances is 'Red' 'Amber' 'Green' (RAG),** usually given to indicate the level of response required, or the status of the topic.

27.3 Visual Management (VM) boards provide **a means of ensuring the whole team is kept informed of what matters to them, what can have an adverse effect their operations and ability to perform well.** A simple management board (or computer portal) orientates team effort to achieving those Key Performance Indicators (KPIs). An up-to-date Visual Management board is a quick and easy way of giving feedback to the team on how the team is performing; where improvement is necessary and where the team is achieving its KPIs, or even excelling in them.

27.4 **The content of a board dedicated to Visual Management is decided on by careful consideration of what affects the team.** No two boards need necessarily have the same information on them. It is up to the manager and the team to identify what matters to them, **while remaining aligned to the Objectives of the company.** Alignment is achieved through **Policy Deployment, a topic of PAM 3.**

27.5 The deployment of common Objectives throughout the company means that the **tone** of the Visual Management board **will vary depending on where it is in use.** For example, a strategic VM board at Group level will be focused on information that affects the whole of the company, while a departmental board will be focused much more on the operational day-to-day running of the area.

27.6 Visual Management boards should be **easily digestible for the reader.** Such a board provides key information ensuring everyone has sight of what matters; and theirs and the team's role in achieving successful outcomes.

27.8 The manager could **adopt a coaching approach towards the team** when deciding on the content of a Visual Management board, guiding the team to identifying the essential information for themselves. Coaching is a topic of PAM 2. Adopting **a coaching approach ensures the team is engaged and encourages ownership** of the content of Visual Management



Activity 27.1 Deployment of Visual Management

What information does your Visual Management board (physical or digital) need?	Visual Management Board
What is the most important single piece of information for the team?	
What are the top three? (Add more later as the board develops).	
Which charts and graphs are appropriate? How often do they need updating? By whom?	
How can the team be involved?	
Where is the best place for the Management board?	



PAM1 'Communication'

Notes: