

# ***MANAGING MANAGERS***



**INSTRUCTOR GUIDE**

**1-DAY COURSE**

**HRDQ<sup>®</sup>**

***MANAGING MANAGERS***

Copyright © 2008 Treeline 2008

Published by HRDQ

2002 Renaissance Boulevard #100

King of Prussia, PA 19406

Phone: (800) 633-4533

Fax: (800) 633-3683

Web: [www.HRDQ.com](http://www.HRDQ.com)

No part of this publication may be reproduced or transmitted in any form or by any means except as permitted under HRDQ's End User License Agreement, and the 1976 United States Copyright Act (17 U.S.C.) sections 107 and/or 108. Inclusion in any publication, whether for commercial or non-commercial purposes, is prohibited. Requests for permission to reproduce or reuse this content outside the terms of the End User License Agreement, should be addressed to [permissions@hrdq.com](mailto:permissions@hrdq.com) or (610) 279-2002

For additional Reproducible Program Library licenses please contact the HRDQ Client Solutions Team at (800) 633-4533

The material in this publication is provided "as is." HRDQ disclaims any warranties, expressed or implied, regarding its accuracy or reliability, and assumes no responsibility for errors or omissions. To the extent permissible by law, HRDQ accepts no liability for any injuries or damages caused by acting upon or using the content contained in this publication.

Version 2.0

Last updated May, 2008

ISBN 978-1-58854-448-3

## Reproducible Program Library—End-User License Agreement

### IMPORTANT! PLEASE READ!

The following terms and conditions are a legal agreement between Organization Design & Development, Inc. DBA HRDQ (“HRDQ”) and You, Your organization, its subsidiaries, affiliates, and legal partners (“You”) regarding the Reproducible Program Library (“RPL”).

You may use the RPL only in accordance with the terms of this agreement as set forth below.

1. License Grant. HRDQ hereby grants You a non-exclusive and non-transferable license to download, reproduce, customize, and otherwise make use of the RPL within the terms of this agreement.
2. Proprietary Rights. The RPL is the sole and exclusive property of HRDQ and/or its authors including all right, title, and interest in and to the RPL. Except for the limited rights given to You herein, all rights are reserved by HRDQ.
3. Term. This Agreement is effective upon acceptance, and will remain in effect in accordance with the term of the license purchased. The specific term of this Agreement is defined on the sale invoice provided You at the time of purchase and available thereafter from HRDQ.
4. Authorized Use of Library. For the term of this license, You may:
  - (a) Store the RPL on a computer,
  - (b) Amend, edit, and change the RPL provided that all original copyright notices, and trade and service marks, remain intact and appear on this agreement and amended versions and reproductions thereof,
  - (c) Print and distribute paper copies of the RPL for educational or training activities, whether with direct employees, students, agents, or clients, and,
  - (d) Resell the RPL, in whole or in part, provided You have a current reseller agreement with HRDQ.

You may not:

- (a) Translate, reverse engineer, decompile, disassemble, or create derivative works based on the RPL,
  - (b) Include the RPL, in whole or in part, in any publication, product or service offered for sale,
  - (c) Lease or loan the RPL,
  - (d) Distribute the RPL through the means of a removable storage medium, such as CD-ROM or DVD,
  - (e) Copy or upload the RPL onto any bulletin board service or public Internet site, or,
  - (f) Sublicense or reassign this license.
5. Termination. Failure to perform in the manner required in this agreement shall cause this license to automatically terminate and HRDQ may exercise any rights it may have. Upon natural expiry of the term, unless renewed by You with HRDQ, access to the download site will be denied and all passwords rendered inactive. Upon termination, for whatever reason, You must destroy all original and amended versions of the RPL, in any and every format, and certify as such, in writing, to HRDQ upon request. All provisions of this license with regard to the protection of the proprietary rights of HRDQ shall continue in force after termination.
  6. Warranty. The RPL is provided “as is.” HRDQ warrants that the RPL does not violate any copyrights, trademarks, trade secrets, or patents of any third parties. HRDQ disclaims all other warranties, expressed or implied, regarding its accuracy or reliability, and assumes no responsibility for errors or omissions. To the extent permissible by law, HRDQ accepts no liability for any injuries or damages caused by acting upon or using the content contained in the RPL. If any part of the RPL is defective in workmanship or materials, HRDQ’s sole and exclusive liability, and sole and exclusive remedy for You, shall be replacement of the defective material. HRDQ’s warranty shall survive the termination of this agreement. Some states do not allow exclusions or limitations of implied warranties or liability in certain cases, so the above exclusions and limitations may not apply to You.
  7. Permissions. Any other use of the RPL not defined in this agreement is subject to the written approval of HRDQ.

HRDQ, 2002 Renaissance Blvd. #100, King of Prussia, PA 19406, 610.279.2002, [www.hrdq.com](http://www.hrdq.com).

# Instructional design and learning philosophy

We are committed to providing the best core skills content possible for Instructor-Led Training (ILT). The following principles are applied in the development of programs:

## Sound instructional design

All course content is developed using a variety of research techniques. These include:

- Brainstorming sessions with target audience
- Library research
- Online research
- Customer research (i.e., focus groups, surveys)
- Subject Matter Experts (SMEs)
- Interviews with trainers

Expert instructional designers create imaginative and innovative solutions for your training needs through the development of powerful instructional elements. These include:

- Learning objectives — effective tools for managing, monitoring and evaluating training
- Meaningfulness — connects the topic to the students' past, present and future
- Appropriate organization of essential ideas — helps students focus on what they need to know in order to learn
- Modeling techniques — demonstrates to students how to act and solve problems
- Active application — the cornerstone to learning — helps students immediately apply what they have learned to a real-life situation
- Consistency — creates consistent instructions and design to help students learn and retain new information
- Accelerated learning techniques — creates interactive, hands-on involvement to accommodate different learning styles

## Application of adult learning styles

Adults learn best by incorporating their personal experiences with training and by applying what they learn to real-life situations. Our experienced instructional designers incorporate a variety of accelerated learning techniques, role-plays, simulations, discussions, and lectures within each course. This ensures that the learning will appeal to all learning styles and will be retained.

# Course activities

Type of Activity	Segment
	Introduction
	What are your guiding principles as a manager?
	Translating the organizational vision into functional strategies
	Developing meaningful performance measurements
	Task management worksheet
	Evaluate your skills
	Monday morning tools
	Examine your area's capacity for risk



Reading



Written Exercise



Facilitation



Group Activity

## Course activities (cont)



Reading



Written Exercise



Facilitation



Group Activity

Type of Activity	Segment
	Job description: Translator
	Job description: Information pipeline
	Job description: Storyteller
	Job description: Listener

## Course activities (cont)

Type of Activity	Segment
	Understanding what motivates your managers
	Remove obstacles and demotivators
	Creating a sense of unity and purpose among different units
	Choosing the most appropriate leadership style
	The dreaded micromanager



Reading



Written Exercise



Facilitation



Group Activity

## Course activities (cont)

Type of Activity	Segment
	Introduction
	Using delegation as a tool for growth
 Reading	Recognize "emotional contracts"
 Written Exercise	Giving direction without giving answers
	Coaching managers
 Facilitation	Tips for managing a diverse workforce
 Group Activity	

# Contents

Licensing agreement.....	iii
Instructional design and learning philosophy .....	iv
Course activities.....	v
Table of contents .....	ix
Course objectives .....	xii
Introduction .....	14
What are your guiding principles as a manager?.....	15
The fear factor.....	16
Translating the organizational vision into functional strategies.....	17
Balancing daily tasks with long-term strategies.....	17
Extracting goals from your mission statement .....	18
Achieving goals through individual execution .....	19
Developing meaningful performance measurements .....	20
Stick to these guiding principles:.....	20
What to measure:.....	20
Task management worksheet.....	21
Evaluate your strategic skills.....	22
Strategic thinking skills.....	23
SWOT analysis.....	23
Risk analysis.....	24
Developing strategic relationships.....	24
Job description: Translator.....	26
Shifting between big-picture and daily-task focus:.....	26
Job description: Information pipeline .....	27
Sharing feedback up and down the organizational ladder.....	27
Job description: Storytelling .....	28

Using storytelling to inspire and share information.....	28
Job description: listener .....	29
Two basic listening modes.....	29
Levels of reflection.....	29
How to do it:.....	29
Listening self-assessment.....	30
Specific words and phrases .....	31
For a difficult or confrontational conversation.....	31
Understanding what motivates your managers.....	34
Definition of empowerment.....	34
Building ownership.....	34
Removing obstacles and demotivators .....	35
Creating a sense of unity and purpose among different units.....	36
Choosing the most appropriate leadership style.....	37
The dreaded micromanager.....	39
Avoiding micromanaging while maintaining practice controls.....	40
Introduction .....	44
Your hidden responsibility.....	44
Using delegation as a tool for growth.....	45
Traps to avoid:.....	46
How to delegate work “only you can do”: .....	46
Before you delegate, answer these questions:.....	46
Recognizing “emotional contracts”.....	47
Giving direction without giving answers .....	48
Coaching managers.....	49
Defensiveness assessment.....	50
Coaching the “uncoachable” .....	51
What are some good goals?.....	51

Tips for managing a diverse workforce ..... 52

Different types of diversity:.....52

How diversity affects decision making and conflict:..... 52

Delegation form..... 54

Action plan ..... 55

Course review ..... 56

Course evaluation ..... 58

Course evaluation (cont)..... 59



Why a program about managing managers? What is it that's difficult? #1: Balancing daily tasks with long-term strategic thinking. If you have managers reporting to you, lots of their "stuff" ends up being "fires" for you to put out. #2: Your direct reports may manage a wide variety of functions, and it's difficult for you to create a sense of unity and cohesiveness for your entire group. #3: If you're typical of most mid-level managers (and of most people!), you would just as soon ignore sticky situations such as dealing with difficult people. In fact, you may even back away. Managing managers takes courage, and we're going to give you a two-pronged approach — focusing on developing your business strategy and leadership strategy skills.



## Course objectives

Successful completion of this course will increase your knowledge and ability to:

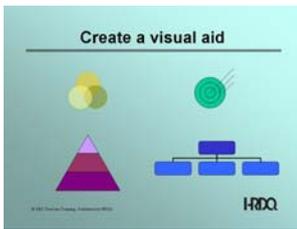
- Understand your role as liaison between senior management and front-line managers.
- Identify the special challenges facing your managers.
- Help managers recognize their dual focus between long-term planning and daily performance.
- Inspire a shared vision.
- Adjust your leadership style to meet your managers' needs.
- Use delegation to empower your managers.
- Create action steps to develop your managers.

# Chapter One



## ***YOUR ROLE AS LIAISON***

**Icebreaker activity:** List five things/items/trends/relationships that are affecting your career for good or ill. Then get in small groups and compare your answers. Create a visual aid — pie chart, graph, drawing, etc. that depicts your group's main influences. Debrief by sharing visual aids, and discussing the similarities and differences. Note: Provide chart paper to each group for them to create their visual aids.



Middle managers often get a bad rap as extraneous, expendable, etc. In stripping out levels of middle management, companies often discard large groups of employees whose knowledge and experience cannot be easily replaced.

**Activity:** Brainstorm strengths of mid-level managers. Possible answers: Unparalleled knowledge of the company, its products, its customers and suppliers (i.e., institutional knowledge), greater understanding than most others in the company about how things work and how work gets done, substantial insights about how the company's business can be improved.

## Introduction

*Instructions: List five trends/relationships/situations/influences that are affecting your career for good or ill.*

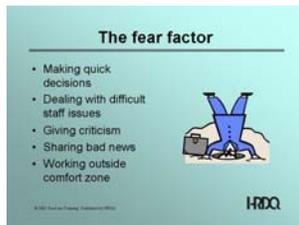
*Create a visual aid that depicts your group's main influences.*

## What are your guiding principles as a manager?

Review the guiding principles on this page. Obviously, managers want to be invested in the approaches on the right side of the page. Suggest that participants place a check next to whichever items they currently identify themselves with.

Less productive	Results/Achievement
<b>Manager as caretaker</b> Hopes someone else will take ownership; avoids what is unpleasant	<b>Manager as owner</b> Assumes responsibility for the outcome; takes initiative to make things better
<b>Reactionary</b> Waits to act until told to do so; barriers and setbacks result in inaction	<b>Proactive</b> Seeks ideal results; identifies barriers and seeks alternatives to overcome them
<b>Slow decision making</b> Over-analyzes to the point of inaction; seeks all possible data to make decisions	<b>Intelligent risk-taker</b> Spots opportunities and capitalizes on them; makes decisions based on appropriate input
<b>Expecting to be served</b> Mindset: "What have you done for me today?"	<b>Service-oriented</b> Mindset: "What can I do to help others excel today?"
<b>Compliance through power or persuasion</b> Communicates in a way that implies a direction or suggestion; makes others feel they need to accept and conform	<b>Compliance through voluntary participation</b> Communicates in a way that allows others to see, understand and take ownership of goals themselves
<b>Resists coaching</b> Focuses more on being right, looking good and appearing in charge	<b>Embraces coaching</b> Seeks feedback; isn't defensive when given criticism; is curious and observant

Part of the reason some managers stay on the left side of the chart on the previous page is because managing well takes guts. It's easier and safer to avoid taking risks, rocking the boat, etc. But that is not the way to achieve long-term success.



This list, from a study conducted in January, 2004, by Common Purpose, a British organization, shows the top ten issues that cause managers to lose courage. Ask participants how many of them they can relate to.

Other situations that managers fear:

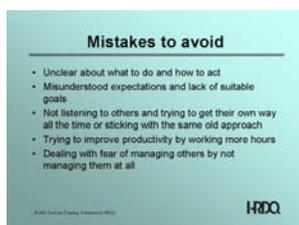
Negotiating with people outside their authority — colleagues, customers, suppliers, or civil servants.

Making judgments or decisions under time pressure

Communicating bad news — upwards or downwards

Building credibility with important new clients/customers/stakeholders

This program will give managers the confidence to deal with these issues and more.



## The fear factor

*Or, when managers lack courage, they may have problems with:*

1. Doubting their own judgment
2. Feeling dispirited when whatever they're doing isn't working
3. Dealing with difficult staff issues (e.g., layoffs)
4. Working with poor support from above
5. Dealing with difficult personalities
6. Handling the unexpected
7. Giving criticism
8. Dealing with angry, bullying or hostile customers
9. Feeling out of touch
10. Dealing with things outside their area of expertise

# Translating the organizational vision into functional strategies

Middle managers are expected to "connect the dots" in linking strategy to the work that needs to be done. By communicating the "why" behind the "what" of assignments, middle managers strengthen team clarity and commitment and ensure that the projects they lead are aligned with strategic outcomes. They are the "glue" that connects top management vision with everyday activities.

## Balancing daily tasks with long-term strategies

*Write your organization's mission statement here:*

---



---



---



---



---

Direct report — main functions	How it connect/supports the organization mission statement

In managing "up," middle managers need to effectively pull out the management group "hows and whys" embedded in the strategies and give feedback to management.

In managing "down," they need to lead their employees in ways that help each person's aspirations connect with bigger goals, and invigorate each one to contribute his or her best.



The mission statement guides goals and specifies an overall strategy. A good mission statement explains your reason for being, provides a general sense of direction, and identifies what you stand for. Keeping your mission in mind will help focus on tasks that are most meaningful and bring the most value to the organization.

**Activity:** Fill in your organization's mission statement. Then list the main functions for each of your direct reports and write down how it connects with the organization's mission. This is the beginning of the translation process — the process linking the big picture to daily tasks.

The object of goal identification is to make certain that individual goals support the organization's mission.

**Activity:** Look at the functions you listed on the previous page, and answer the questions on this page to help you determine if your tasks and responsibilities are in line with the organization's mission.

**Tips:** In the absence of a clearly defined outcome strategy, the focus will be on activities alone and this will not ensure success.

## Extracting goals from your mission statement

After reviewing your mission statement, you will have a starting point for developing concrete goals. Ask yourself the following questions:

*Why are we doing this?*

---

---

---

*What difference will it make?*

---

---

---

*Is there an easier way or a better action to take?*

---

---

---

*Are the right people involved?*

---

---

---

*Does it improve results?*

---

---

---

# Achieving goals through individual execution

To develop an action plan, you'll need to walk through the following process:

1. For each goal, identify the necessary chain of actions:  
 Work backward. Start with the last action needed and indicate the date by which it must be completed.  
 Then list the action that must be completed before that, before that, and so on.
2. Note the resources needed to complete the task in the given timeframe.
3. List the projected results, measurement criteria, and specifics of what you'll be measuring.

*Activity: Identify a task set for one of the goals you examined on the previous page.*

Tasks/action steps	Deadline	Resources needed	Criteria/key metrics

Continuing this step-by-step process, once you're confident that you've chosen the best goals, you want to make them even more concrete by developing an action plan to go with each goal. Follow the steps on this page.

**Activity:** Have participants work in small groups to complete the chart at the bottom of this page. Debrief by having each group share its goal and corresponding action steps.

The ideal measurement system is one that energizes employees to focus on improving things that really matter. It should also give people the freedom they need to expand their potential and roles in the organization in a way that their own success aligns with the organization's success. We've started that process by showing you how to build goals and tasks that are derived from the organization's mission. In this phase, the most important thing is to measure things that matter, and avoid creating measurements that have unintentional negative consequences. Above all, keep it simple so it will be used.

Over-complexity can create unnecessary details that end up paralyzing decision making and clutter the useful data.

Activity versus results: Begin by asking, "What result must this employee produce that will add value for the customer, or help us achieve our corporate goals?", and then, "How would we know that this result was done well?"

Balance the need for actionable information at all levels with the absolute imperative never to overload anyone. Ask yourself: Will the person receiving this information do anything with it themselves? If the answer is yes, make sure they get it. If the answer is no, don't send it to them.



## Developing meaningful performance measurements

### Stick to these guiding principles:

Measure what matters

Keep it simple

### What to measure:

Avoid activity-based measurements; aim for results-based measurements.

Employees and managers must agree on metrics:

Result oriented

Important

The system shouldn't create additional work.

Easy to report

# Task management worksheet

Ongoing work	Connection to organization's strategy	Key milestones and deadline	Current status	Concerns and barriers	Owner
Priorities and upcoming projects	Connection to organization's strategy	Key milestones and deadline	Current status	Concerns and barriers	Owner

Use this worksheet to help you/your managers keep track of both the big-picture mission objectives and the daily tasks that support them.

Set clear priorities: This is one of the most important things strategic leaders do. Clear priorities facilitate coordinated action across the enterprise and provide a basis for acting decisively with both the short and long term in mind. They also help establish the relative importance of different initiatives.

Create conditions for others' effectiveness: Establish how business strategy will be carried out, focusing on the human and organizational capabilities needed to achieve long-term goals. This includes balancing direction and autonomy, rewarding appropriate risk-taking and ensuring that systems support the organization's direction and priorities.

Act decisively in the face of uncertainty: Strategic decisions always involve some level of uncertainty. Strategic leaders try to reduce the level of uncertainty surrounding key decisions, but don't wait to take action until certainty is perfect.

Have the courage of your convictions: Strategic leaders invest in uncertainties. You typically don't get immediate feedback about the wisdom of your decisions. The impact of those choices may not be clear for months, years, or even decades. It takes strength and courage to stay the course.

## Evaluate your strategic skills

*Instructions: Gauge your strategic action skills by circling the number that best represents your skill level for each statement.*

1=Almost never    2=Once in a while    3=Fairly often    4=Almost always

1.	I am decisive in the face of uncertainty.	1   2   3   4
2.	I manage the tension between success in daily tasks and success in the long term.	1   2   3   4
3.	I implement tactics consistent with strategy.	1   2   3   4
4.	I make decisions that are strategically consistent with each other.	1   2   3   4
5.	I facilitate others' actions by providing them a helpful balance of direction and autonomy.	1   2   3   4
6.	I find ways to reward appropriate risk-taking.	1   2   3   4
7.	I recognize the need to adapt existing plans to changing conditions.	1   2   3   4
8.	I learn from actions by deliberately reflecting on their consequences, and use such learning to inform future decisions and actions.	1   2   3   4
9.	I examine mistakes for their learning value (as opposed to apportioning blame).	1   2   3   4

***To develop your strategic abilities, focus on these behaviors:***

Understand how decisions affecting your area will impact other areas in the organization and its overall performance.

Set clear priorities.

Act decisively in the face of uncertainty.

Create conditions for others' effectiveness.

Have the courage of your convictions.

Strategic thinking skills are tools to help you understand and analyze your area's current situation, and identify untapped opportunities and unrecognized threats.

# Strategic thinking skills

## SWOT analysis

**Strengths:** *What internal capacities or assets give your area a competitive advantage? In what ways does your area serve its key internal and external stakeholders well?*

---

---

---

**Weaknesses:** *What internal capabilities is your area relatively ineffective or inefficient at performing, or limited in capacity as to put it at a competitive disadvantage? In what ways does your area fall short in serving key internal and external stakeholders?*

---

---

---

**Opportunities:** *What conditions or possible future conditions in the external environment might give your area a competitive advantage and enhance achievement of its vision if taken advantage of?*

---

---

---

**Threats:** *What conditions or possible future conditions in the external environment might put your area at a competitive disadvantage and inhibit achievement of its vision if steps are not taken to minimize their impact?*

---

---

---

**SWOT analysis**

- Someone two levels above you
- Someone from a different functional area
- Someone with a reputation for being solid and level-headed
- Someone with a reputation for being creative and thinking "out of the box"

© 2007 HRDQ. All Rights Reserved. HRDQ

You're probably familiar with the SWOT method of analyzing the organizational environment. It's often used at an organizational level, but you can use it effectively at a more micro level (i.e., your area(s) of responsibility). **Activity:** Begin by doing a SWOT analysis by yourself. Allow several minutes for participants to answer the questions, thinking of their area(s) of responsibility.

Next, solicit the advice of several other individuals from your organization to gain their perspectives. Include:

- Someone two levels above you
- Someone from a different functional area
- Someone with a reputation for being solid and level-headed
- Someone with a reputation for being creative and using "out of the box" thinking

Independently ask each person what he or she considers your area's two or three most strategically important strengths, weaknesses, opportunities and threats. Compare their answers with your own. Not only will you find areas of agreement, you'll see how your insights and perspective differs from others.

Note: This is a very effective activity to ask each of your managers to complete, too.

Risk analysis is another strategic thinking skill. Taking calculated risks is essential for successfully implementing a strategic plan. And, it's important for you as a manager to encourage your direct-report managers to develop similar risk analysis skills. Answer these questions to determine your current appetite for taking risks. Note: The questions are slanted toward taking too little risk, because as we saw in the study at the beginning of this chapter, most managers are afraid to act.



Yet another way to develop your strategic thinking is to develop strategic relationships. They can take many forms: Internally with upper management, front-line employees; externally with customers, suppliers. Goal: To create interdependence by understanding how decisions affecting your area will impact other areas in the organization, and its overall performance.



## Risk analysis

Am I encouraging an appropriate level of risk taking for us to be successful?

What are some examples of appropriate risk that we've taken in the past?

What are some examples of seemingly appropriate risk that we didn't take?

How do we handle mistakes? Does my/our response stifle even moderate levels of risk taking?

What other barriers have I/we imposed on ourselves that have created obstacles to appropriate risk taking?

## Developing strategic relationships

Why: Understand how decisions affecting your area will impact other areas in the organization and its overall performance.

Upper management

Peers

Front-line employees

Customers

Suppliers

Surveys of mid-level managers have shown that they have many ideas for improving aspects of their organization's business and for new opportunities for their business. Developing strategic relationships will increase their chances of getting their ideas heard and acted upon.