Leading Culture Change
Development Directory
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Introduction

The Leading Culture Change Development Directory has been specially developed to aid the Managers of Leeds City Council, Adult Social Care, in the transition of the Self Directed Support (SDS) process. This toolkit forms part of a suite of learning solutions designed to further your learning and development throughout the implementation stages of personalisation and is focused primarily on Culture Change.

The aim of the toolkit is to aid your understanding of the implications the change will have from both a cultural and behavioural perspective for both yourselves as managers, and the teams you lead. The toolkit offers an array of self directed learning activities, tips and techniques and additional learning resources, which will ultimately make you feel more confident and competent to undertake your role effectively.

Self Directed Learning

Self-directed learning is a cyclical process of alternating between picturing your ideal self (who you want to be), and then building an accurate picture of your real self (who you actually are). Understanding who you want to be acts as a motivational driver for getting you to change your habits and behaviour. Understanding your weaknesses shows you what you need to improve on, while getting to know your strengths indicates the things you need to build on.

Once you have reached this level of understanding, you can begin to identify where the gaps are between your real self and your ideal self, and then to experiment with new ways of behaving, thinking and feeling. The final stage involves putting what you have experimented with into practice by beginning to develop relationships and behaving in new ways.

Purpose and Application

The directory has been split into six sections to help you focus on specific areas of development. They are; Culture, Managing Change, Motivation and Engagement, Leadership, Performance Management, and Coaching. Within each section you will find an array of Self Directed Learning Activities, Tips and Techniques, and Additional Learning Resources. The Self Directed Learning Activities are a mix of practical tools which can be used by individuals and/or groups to further develop your understanding of the areas outlined, to encourage exploration of such areas, and to identify where strengths and potential development areas may exist. The tips and techniques are short, practical bits of advice which may be useful for your own development, or to refer to when addressing the development of your team. Furthermore, the Additional Learning Resources are optional reference materials which can be accessed as and when required, to support learning.

This toolkit has been designed as a reference tool for you to use as part of your individual development, and/or the development of your team. You will not be expected to undertake all activities, or refer to all of the materials outlined in the Additional Learning Resource section, and activities can be tailored to suit your and your team’s development.
Learning Styles

Before embarking on the activities outlined in the following 6 sections, it is worth first exploring learning styles. People take in and retain information in very different ways. Acknowledging and recognising this as a manager will help you to identify how best to implement training and coaching methods as part of the performance management process.

Below is a Learning Styles Questionnaire which will take approximately 40 minutes to complete and can be completed on an individual basis, or for all team members. Honey and Mumford are the main researchers in this field and the following questionnaire has been developed based on their work. It is designed to help you and your team to find out your preferred learning style(s) which may be useful when deciding which activities to utilise with your team and with individual team members.

There are no right or wrong answers, but try to be accurate. If you agree more than you disagree with a statement put a tick next to it. If you disagree more than you agree put a cross by it. Do not miss any questions out, as that will affect the result.

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<tr>
<td>1</td>
<td>I like to be absolutely correct about things</td>
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<td>I quite like taking risks</td>
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<td>I prefer to solve problems using a step-by-step approach rather than guessing</td>
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<td>I prefer simple, straightforward things rather than something complicated</td>
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<td>I often do things ‘just because I feel like it’ rather than thinking about it first</td>
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<td>I don’t often take things for granted. I like to check things out for myself</td>
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<td>7</td>
<td>What matters most about what you learn is whether it works in practice</td>
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<td>8</td>
<td>I actively seek out new things to do</td>
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<td>When I hear about a new idea I immediately start working out ways to try it out</td>
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<td>10</td>
<td>I am quite keen on sticking to fixed routines, keeping to timetables etc.</td>
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<td>I take great care in working things out. I don’t like jumping to conclusions</td>
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<td>I like to make decisions very carefully after weighing up all the possibilities first</td>
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<td>I don’t like ‘loose ends’, I prefer to see things fit into some sort of pattern</td>
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<td>In discussions I like to get straight to the point</td>
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<td>I like the challenge of trying something new and different</td>
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<td>I prefer to think things through before coming to a conclusion</td>
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<td>I find it difficult to come up with wild ideas off the top of my head</td>
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<td>I prefer to have as much information about a subject as possible. The more the better</td>
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<td>I prefer to jump in and do things as they occur rather than plan things in advance</td>
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<td>20</td>
<td>I tend to judge other people’s ideas on how they work in practice</td>
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<td>I don’t think a decision can be made on what ‘feels’ right. You must have all the facts</td>
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<td>I am rather fussy about how I do things – a bit of a perfectionist</td>
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<td>23</td>
<td>In discussion I usually pitch in with lots of wild ideas</td>
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<td>In discussions I only put forward ideas I know will work</td>
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<td>25</td>
<td>I prefer to look at a problem from as many different angles as I can before starting</td>
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<td>26</td>
<td>Usually I talk more than I listen</td>
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<td>27</td>
<td>Quite often I can work out more practical ways of doing things</td>
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<td>28</td>
<td>I believe that careful, logical thinking is the key to getting things done</td>
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<td>If I write a formal letter I prefer to try out some rough workings before the final version</td>
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<td>I like to consider all the alternatives before making up my mind</td>
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<td>31</td>
<td>I don’t like wild ideas. They are not very practical</td>
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<td>32</td>
<td>It is best to look before you leap</td>
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<td>I usually do more listening than talking</td>
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<td>It doesn’t matter how you do something, as long as it works</td>
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<td>I can’t be bothered with rules and plan, they take all the ‘fun’ out of things</td>
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<td>I’m usually the ‘life and soul of the party’</td>
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<td>I do whatever I need to do to get the job done</td>
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<td>I like to find out how things work</td>
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<td>I like meetings or discussions to follow a proper pattern and keep to a timetable</td>
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<td>I don’t mind in the least if things get a bit out of hand</td>
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Learning Styles Questionnaire: Scoring

For each of the questions you have ticked put a ’1’ beside the question number below and then add up the ’1’s’ in each column.

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Plot your scores for each column on the arms of the cross below and then joint the points on adjacent axes as in the example shown. This will give a graphic representation of where your main learning strengths lie.
Learning Styles Questionnaire: Interpretation and Application

In this section we show how you and your team can make a better choice of activities which are likely to suit yours and other's style(s) of learning. Below are four checklists to help guide individuals towards learning activities that suit their style, and which areas to also avoid. You do not have to study the detail on all of them, instead concentrate on the parts that are relevant to you and your team members, in light of your Leadership Style Questionnaire results.

ACTIVISTS

If you have a preference for the ACTIVIST STYLE you will learn best from activities where:

- There are new experiences/problems/ opportunities from which to learn
- You can engross yourself in short “here and now” activities such as business games, competitive teamwork tasks, role-playing exercises
- There is excitement/drama/crisis and things chop and change with a range of diverse activities to tackle
- You have a lot of the limelight/high visibility i.e. you can “chair” meetings, lead discussions, give presentations
- You are allowed to generate ideas without constraints of policy or structure or feasibility
- You are thrown in at the deep end with a task you think is difficult i.e. when set a challenge with inadequate resources and adverse conditions
- You are involved with other people i.e. bouncing ideas off them, solving problems as part of a team
- It is appropriate to “have a go”

As an ACTIVIST you will learn least from, and may react against, activities where:

- Learning involves a passive role i.e. listening to lectures, monologues, explanations, statements of how things should be done, reading, watching
- You are asked to stand back and not be involved
- You are required to assimilate, analyse and interpret lots of “messy” data
- You are required to engage in solitary work i.e. reading, writing, thinking on your own
- You are asked to assess beforehand what you will learn, and to appraise afterwards what you have learned
- You are offered statements you see as “theoretical” i.e. explanations of cause or background
- You are asked to repeat essentially the same activity over and over again i.e. when practising
- You have precise instructions to follow with little room for manoeuvre
- You are asked to do a thorough job i.e. attention to detail, tie up loose ends, dot i’s and cross t’s.
**REFLECTORS**

If you have a preference for the REFLECTOR STYLE you will learn best from activities where:

- You are allowed or encouraged to watch / think/ chew over activities
- You are able to stand back from events and listen/observe i.e. observe a group a group at work, taking a back seat in a meeting, watching a film or CCTV
- You are allowed to think before acting, to assimilate before commenting i.e. time to prepare, a chance to read in advance, a brief giving background data
- You can carry out some painstaking research i.e. investigate, assemble information, probe to get to the bottom of things
- You have the opportunity to review what has happened, what you have learnt
- You are asked to produce carefully considered analysis and reports
- You are helped to exchange views with other people without danger i.e. by prior agreement, within a structured learning experience
- You can reach a decision in your own time without pressure and tight deadlines

As a REFLECTOR you will learn least from, and may react against, activities where:

- You are “forced” into the limelight i.e. to act as leader/chairman, to role-play in front of onlookers
- You are involved in situations which require action without planning
- You are pitched into doing something without warning i.e. to produce an instant reaction, to produce an "off-the-top-of-the-head" idea
- You are given insufficient data on which to base a conclusion
- You are given cut and dried instructions of how things should be done
- You are worried by time pressures or rushed from one activity to another
- In the interests of expediency you have to make short cuts or do a superficial job

**THEORISTS**

If you have a preference for the THEORIST STYLE you will learn best from activities where:

- What is being offered is part of a system, model, concept, theory
- You have time to methodically explore the association and inter-relationships between ideas, events and situations
- You have the chance to question and probe the basic methodology, assumptions or logic behind something i.e. by taking part in a question and answer session, by checking a paper for inconsistencies
- You are intellectually stretched i.e. by analysing a complex situation, being tested in a tutorial session, by teaching high calibre people who ask searching questions
- You are in structured situations with a clear purpose
- You can listen to or read about ideas and concepts that emphasise rationality or logic and are well argued/elegant/watertight
- You can analyse and then generalise the reasons for success or failure
- You are offered interesting ideas and concepts even though they are not immediately relevant
- You are required to understand and participate in complex situations
As a THEORIST you will learn least from, and may react against, activities where:

- You are pitchforked into doing something without a context or apparent purpose
- You have to participate in situations emphasising emotions and feelings
- You are involved in unstructured activities where ambiguity and uncertainty are high i.e. with open-ended problems, on sensitivity training
- You are asked to act or decide without a basis in policy, principle or concept
- You are faced with a hotchpotch of alternative/contradictory techniques/methods without exploring any in depth i.e. as on a “once over lightly” course
- You doubt that the subject matter is methodically sound i.e. where questionnaires haven’t been validated, where there aren’t any statistics to support argument
- You find the subject matter platitudinous, shallow or gimmicky
- You feel yourself out of tune with other participants i.e. when with lots of Activists or people of lower intellectual calibre

PRAGMATISTS

If you have preference for the PRAGMATIST STYLE you will learn best from activities where:

- There is an obvious link between the subject matter and a problem or opportunity on the job
- You are shown techniques for doing things with obvious practical advantages i.e. how to save time, how to make a good first impression, how to deal with awkward people
- You have the chance to try out and practice techniques with coaching/feedback from a credible expert i.e. someone who is successful and can demonstrate the techniques themselves
- You are exposed to a model you can emulate i.e. a respected boss, a demonstration from someone with a proven track record, lots of examples/anecdote, a film showing how it’s done
- You are given techniques currently applicable to your own job
- You are given immediate opportunities to implement what you have learnt
- There is a high face validity in the learning activity i.e. good simulation, “real” problems
- You can concentrate on practical issues i.e. drawing up action plans with an obvious end product, suggesting short cuts, giving tips

As a PRAGMATIST you will learn least from, and may react against, activities where:

- The learning is not related to an immediate need you recognise/you cannot see, an immediate relevance/practical benefit
- Organisers of the learning, or the event itself, seems distant from reality i.e. “ivory towered”, all the theory and general principles, pure “chalk and talk”
- There is no practice or clear guidelines on how to do it
- You feel that people are going round in circles and not getting anywhere fast enough
- There are political, managerial or personal obstacles to implementation
- You can’t see sufficient reward from the learning activity i.e. more sales, shorter meetings, higher bonus, promotion
Section 1 - Culture

What is culture and how does it affect me and my team?

Culture is a term we generally use to group together or sum up a set of social factors we can’t quite put our finger on, such as traditions, behaviour patterns, attitudes, beliefs and commonalities. We usually think of culture in terms of nations or communities. However, the concept has more recently been applied to organisations as a way of understanding how social processes impact performance. An understanding of how culture is created and reinforced in organisations can help managers predict the human impacts of change and the consequences for strategy.

The phrase ‘culture’ has many different applications and definitions. All of us have experienced cultural differences upon moving from one organisation to another. Most people can describe what they ‘feel to be’ the culture of the organisation, but struggle to define it clearly and objectively.

A widely respected scholar on corporate culture is Edgar Schein. In 1985 he suggested that corporate culture is based on distinguishing three levels of association:

1. Artefacts: This includes the look of the physical space, the layout, the outputs of the organisation, the written and spoken language and the overt behaviour of group members.

2. Values: A shared set of convictions, principles, and beliefs which group members use to justify their actions and behaviours.

3. Basic Underlying Assumptions: Unconsciously held beliefs that are fundamental to the core of the organisation. These are implicit assumptions that guide behaviour and determine how group members think about things.
Culture Change

Culture can be changed through people. ie: how and who makes decisions, who gets to influence what, managers being positive role models, success stories, behaviours and values. Culture can also be changed through systems. ie: succession planning, retention, reward, performance measures and management. Whatever the causation of organisational culture changes, the implications remain static and if not dealt with in an appropriate way, can lead to a de-motivated and non-productive workforce.

It is often assumed that what the organisation writes down in terms of its mission, values, objectives and strategies, represents the culture of the organisation. However, more often than not, these represent the aspirations of senior management rather than what actually takes place. Power structures, control systems and organisational structures are powerful influencers of culture, but it is the behaviour of people on a day-to-day basis that really defines what the culture is.

It is important to remember that culture is a messy concept. So many factors combine to create culture that it can be very difficult to define and even more challenging to influence. But it is an important consideration for strategy, as collective experience can either drive or constrain change.

Focus for Section 1

The purpose of this section is to explore the perceptions you yourself, and your team hold on the organisational culture as it stands, and where the culture needs to be in line with change. The section also explores the benefits of creating a knowledge-sharing culture to aid development and improve performance, along with looks at the importance of maintaining organisational effectiveness in times of change.
Self Directed Learning Activities

Activity 1: Assessing Culture

Before you are able to address how best to deal with organisational culture change, it is important to ascertain how your team view the current culture of the organisation and the impact that change will have on this. From gaining this knowledge and feedback, you will then be in a better position to be able to manage the transitional process.

This activity will take approximately 60 minutes to complete and will help you to assess the culture of your organisation/department. Using a questionnaire to seek individual views, you will be able to assess the culture in your area of responsibility. With this information, you will be able to identify any changes that are needed to align the culture with the strategy, in this instance, the new strategy outlined for the implementation of SDS.

This is a particularly useful tool to use in times of change as it will identify where your team are at present, and where you believe they need to be, allowing you to address any differences. You could use this as an individual exercise to collate your own views or, as outlined below, you could distribute to your team to gain a deeper understanding of their views on culture.

Procedure:

1. Distribute the below Culture Questionnaire to your team, making sure you include details of where to return completed forms and ensure confidentiality of the responses. It is important to encourage individuals to be open and honest and to explain their answers fully.

2. Alternatively, you can use the culture questionnaire as a basis for a focus group. In this case, invite representative members of various departments to attend a session. You may need to hold more than one focus group as there should ideally be four to eight people at each session.

3. Collate the responses and highlight the most common issues that have been raised from the team.

4. Look at the responses and consider:
   - What are the key elements contributing to the perceived culture of your department / team?
   - How effectively does the culture support the new strategy / way of working?
• What common themes are a cause for concern and what action will you need to take to ensure these concerns are addressed?
• What common themes are beneficial and what action will you take to reinforce/support them?

5. Think about whether you need to make any changes to align the culture with the new strategy/ways of working. This may include alterations to how you go about achieving the new strategy as well as the culture.

6. Plan how the changes can be made, and what difficulties might be encountered. It is worth noting here that culture is notoriously difficult to change and you may like to bring in a specialist in cultural change from inside or outside the organisation to help you with the process.
Culture Questionnaire

General thoughts
1. How would you describe the organisation to a good friend?

2. How accurate is the image the organisation portrays to the outside world?

3. What are the main reasons why people leave the organisation?

Stories
4. What stories are circulating around your peer group about the organisation and/or its people?

5. What stories are people told when they join the organisation?

6. Who are the heroes and villains of the organisation (past and present)?

Symbols
7. What symbols define the organisation?

8. What are the status symbols in the organisation?

9. How would you describe the style of language used?
**Power**

10. Who holds power within the organisation?

11. How is power used within the organisation?

12. What are the main barriers to change?

**Structure**

13. How would you describe the organisational structure?

14. Does the organisational structure help or hinder you in carrying out tasks?

15. If you have been away for a few days, how do you catch up with what has been going on?

**Controls**

16. What is monitored/controlled closely within the organisation?

17. How and by whom are these controlled?

**Routines and rituals**

18. What are the three most important routines within the organisation (day-to-day tasks and practices)?

19. What are the main rituals (e.g. celebrations, events, training)?
Activity 2: Creating a Knowledge-Sharing Culture

As the world of Social Care evolves and the introduction of SDS becomes embedded within the organisational culture, knowledge within the area will inevitably develop. This may be in the form of familiarisation with the new Self Assessment Questionnaire, the finance options available to clients, or familiarisation with new up-and-coming partnership organisations which can be utilised to address a client’s specific needs. However, it is important to recognise that in the early stages of culture change, the need to share knowledge is vital to ensure the performance of individuals and the team are maximised.

This activity will take approximately 60 minutes to complete and is ideally used in a group setting with other managers or your team. The purpose of the activity is to encourage you to identify the possible barriers to a positive knowledge sharing culture. It is based on the principles of risk analysis and helps to identify possible solutions to these barriers.

Procedure:

1. Split the group into subgroups of around 3 to 4 people. A particularly small team can work together as one group.

2. Hand out the task sheet below and encourage the groups to consider as broad a range of cultural obstacles as possible through a brainstorming session, and to consider the ways in which these obstacles can be reduced or overcome.

3. Bring the groups back together to discuss their conclusions. Ask for a volunteer from each group to summarise their brainstorming session. Create a central/communal list on a flipchart which outlines barriers that have been most frequently identified? Why is this?

4. Consider the following questions within the group:
   - Are the most common barriers those that the individual group have nominated as priorities going forward?
   - What actions are required to break down these barriers?
   - What further actions would encourage a culture of knowledge sharing within the organisation?
   - What would those present do in the long and short term?
   - How else could responsibility be allocated? And what would the timescales be?
   - How can/ will you identify success?
Creating a Knowledge-Sharing Culture: Task Sheet

1. In your group, you should brainstorm the barriers that you can foresee that may prevent a positive knowledge sharing culture within your organisation. It is important to think about what challenges the organisation provide to the changes being implemented?

2. Consider and discuss the ways in which these barriers could be reduced or overcome.

3. Review the barriers and select the top three priorities for action. Which would be the most important to work on in order to let a knowledge-sharing culture flourish?

4. Consider what needs to happen next for this to be taken forward. List the actions required and, if appropriate, allocate timescales and responsibilities.
Activity 3: Maintaining Organisational Effectiveness in a Time of Change—
McKinsey’s 7 S Model

Operating in an efficient and effective way is crucial to good performance and for the successful attainment of goals and objectives. When analysing team and organisational effectiveness, it is important to consider both internal and external contributing factors. Factors which will ultimately shape and influence the culture of an organisation.

This activity will take approximately 60 minutes to complete and is based on McKinsey’s 7 S Model. The theory states that an organisation is not just a structure but is comprised of several elements distinguished by the hard S’s and the soft S’s. The hard elements; strategy, structure and systems, are more tangible, visible and practical, and tend to be seen in mission statements and project plans. The soft S elements are; shared values, skills, style and staff, which tend to be less tangible and more determined by those who work within the organisation and thus continuously change and are therefore harder to influence or anticipate. These soft S’s can and do have a greater impact than the hard S’s within an organisation, but tend to be the ones not fully explored or developed as part of a change process.

Procedure:

• Outlined below are key questions based around the 7 S’s. Individually, or in groups, work through the questions to determine how you / your team perceive the current dynamics of the organisation and the implications that change will have on the seven areas outlined.

• Review which questions were the most difficult to answer and highlight which three of the seven areas need most attention for further development.

• Of the three areas pinpointed, outline how you would go about addressing these concern areas, giving careful consideration to who within the organisation can help to address specific concerns, the resources available, and timescales in which concerns should ideally be addressed by.
Organisational Effectiveness Questions

Strategy
- How do we create an appetite for the new strategy?
- How do we communicate what we expect from staff at all levels?
- What are the main team goals and objectives which link to the strategy?
- What is driving the strategy?

Structure
- Does the current structure support the change?
- How do the different parts of the business interact with each other? How do they need to interact?
- What impact will the changes have on the structure and the people e.g. displacement, flexible working?
- What levels of control do we need in the structure in order for individuals to perform well?

Systems (including processes and infrastructure)
- Do existing systems support the change?
- If there is a change in the systems/process, does the environment support this?
- Who else uses this systems and processes?
- Who is affected by the change?

Shared Values
- How do we encourage positive embracing of changes?
- What kind of behaviours do you need?
- Which of these values are enablers or barriers in achieving success?
- What values do you need to deliver the strategy?

Skills
- How are skills measured?
- How do we continue the offer ongoing support?
- What is the capability? What skills do the people have and need to do the training?
- What is the risk of unskilled people?

Style
- What behaviours do we expect people to display in line with the change?
- What kind of management style do you adopt?
- What do you not like about the current style?
- What approach to we need to support the delivery?

Staff
- How can the organisation best support you and your staff?
- How will you aim to define what roles you have in place, and what roles are needed to address the change?
- What is the current gap in staff vs. what is needed?
- What provision have you made so that skills can be transferred?
**Tips and Techniques**

It is believed that around 50% of culture change management initiatives fail. One of the main reasons for this is a failure to communicate the change effectively to employees, resulting in a lack of behavioural alignment. During times of change, uncertainty is rife and fear of the unknown is a common factor. Clear, effective communication is the key to addressing the people problems associated with culture change. The details outlined below can be used as a reference and guide when thinking about how change is being communicated to your team. The article focuses on presenting knowledge / ideas to a group and what can be done to minimise the negative effects on culture change.

**Internal communications systems**
One of the first steps to take when communicating change is to assess the internal communications system of the organisation. As Peter Drucker has stated ‘the knowledge worker is the single greatest asset’ in business and thus, it is vital that employees are ‘kept in the know’. Informing employees about developments within the organisation will enable them to better align themselves with the corporate vision.

**Test your presentation**
Use senior management as an audience to test run any major presentations before doing it for real with the employees. In doing this you will be able to iron out any differences in opinion and firm up on the specifics. This will also help with finding the right pitch and tone for the presentation.

**Choose your language carefully**
Plans are normally drawn up by senior management for senior management and thus, the language used is often only appropriate for those with the same background information and strategic insights as the managers. If employees are presented with exactly the same information, in the same way, they may leave the presentation more confused than before.

**Introduce your presentation**
For maximum impact and effect, a presentation should begin with an outline of the format it will take. If the audience members are made aware that a certain topic will be addressed during the presentation or that there will be an opportunity for questions at the end, they will be more likely to listen intently to each point.

**Don’t get specific too soon**
Do not rush in with names or departments straight away. Instead, present general information and detail the principles behind the change first. If the information presented is too specific too early,
employees will become fixated on the mention of their names or departments and will be less likely to absorb the rest of the information.

**Be honest**
Give employees straight and honest information. Do not try to positively dress something that is negative. If the news is bad – give it to the employees straight. If you do not have the information asked of you at the moment, explain this to the employees and assure them that you will inform them of this as soon as you have the information.

**Put yourself in your employees’ place**
Try to address the personal needs of employees. Often employees’ first questions will be concerned with how any changes will affect them personally. You need to have carefully thought through the implications of any change and be prepared for serious questions before announcing it. It is important for people to understand why the change is necessary and this should be clearly communicated.

**Be aware of your body language**
Your body language and the actions you make can be just as important and effective as the words you use. You should think about the tone of voice you use too.

**Conduct regular discussions and meetings**
It is essential that employees be kept abreast of the change initiative and development. Use the internal communications system to give employees regular updates, but also conduct regular meetings and discussion where employees have opportunities to ask questions and have them answered by senior management. This works against the rumour mill that flourishes in environments devoid of official communication and information.

**Write an information leaflet**
It is worth bearing in mind that verbal communication is not always the most effective form of giving information. In fact, surveys have shown that change is most effective when a mixture of verbal and written communication is used. The process of having an information booklet put together will not only make sure that senior management are all beating the same drum, but will provide employees with some hard facts and figures that they can continually refer to.

**Prepare for future change**
‘In business, even more than politics, the only constant is change’ (Mickelthwait, 1999). As change is inevitable it makes sense to prepare for it now. If people are made aware of the changes happening within the industry or with the technology used, it will be less of a shock when these changes impact on their organisation or department. Continue to check and improve the communication system within your organisation and you will be better prepared for managing change when it comes along.
Additional Learning Resources

Short Reads

**Leading in a Culture of Change by Michael Fullan**
An easy to read book which offers valuable insight into the dynamics of change. With extensive fully illustrated case studies and examples, plenty of practical exercises and further resources.

Text Books

**Leading Change by John P Kotter**
In Leading Change, John Kotter examines the efforts of more than 100 companies to remake themselves into better competitors. He identifies the most common mistakes leaders and managers make in attempting to create change and offers an eight-step process to overcome the obstacles and carry out the firm's agenda: establishing a greater sense of urgency, creating the guiding coalition, developing a vision and strategy, communicating the change vision, empowering others to act, creating short-term wins, consolidating gains and producing even more change, and institutionalising new approaches in the future.

This unique collection looks at the often messy and difficult process of changing workplace culture. The articles examine why there is resistance to change on a corporate and individual level and explains the effect of passive aversion to cultural problems on company performance.

**Changing Organizational Culture: The Change Agent's Guidebook by Marc J. Schabracq**
To alter an organisation’s culture, change agents must first understand its attitudes, beliefs and assumptions. Marc Schabracq's innovative book is based on a fresh way of thinking that deals with both the functional and structural features of cultures. Focusing on the greatest barrier to organisational change – the attitudes and assumptions of people – it offers three approaches that collectively assist the change process: changing goals through the leader; improving effectiveness through the members; and enriching assumptions through group dialogue.

**Organisational Culture (Financial times management) by Andrew Brown**
This exciting new text on organisational culture gives an overview of a subject which is becoming increasingly popular with both academics and practitioners. It examines the linkages between culture and the concepts of organisational change, human resource management and strategic issues. The reader is given an introduction to the origins of the current interest in organisational culture, with examples drawn from real-life organisations. Building on these fundamental concepts, key issues in the study of culture, such as problems of definition, the development of cultures, sub-cultures and national cultures, are examined in detail. All concepts and theoretical points addressed are illustrated with specific case examples and the final section draws together these concepts and speculates on future trends in organisational culture.
Web Links & Other Resources

http://leadership.wharton.upenn.edu/welcome/index.shtml
This is a link to The Center for Leadership and Change Management, which is an independently managed website of the Wharton School at the University of Pennsylvania. It provides further reading material and links on the topic of leadership in the context of cultural change.
Section 2 - Managing Change

What is change and how does it affect me and my team?

Managers within Leeds City Council are expected to support their teams in solving problems and take responsibility for implementing change effectively. In order to achieve this, managers will be expected to help their staff understand what change means for them, how they can control and deal with the change process, and suggest new ideas that will challenge and stretch the boundaries of current practice. Communication is key to the effective implementation of any change within an organisation, and identifying how your team reacts and copes with change will be instrumental in the success of change implementation.

Why does change sometimes not work?

By examining why change has not worked in previous circumstances, we can evaluate the important aspects of what is needed to be done to ensure that a new change initiative is successful. Evidence to date has shown that staff resistance is the biggest contributor to unsuccessful change. Resistance to change can come either at an institutional level (the organisation as a whole, its culture and values) or at the individual level (staff reluctance to change, fear of the unknown). Both kinds of resistance can condemn a transformational change programme to failure. Identifying these elements of change resistance is important in having the opportunity to overcome them at the early stages of a change initiative. Some of the key areas which can be addressed to overcome resistance to change include increased consultation with all those involved in the process. In the instance of SDS, the behaviours identified to carry the culture change forward within Leeds City Council, have been identified and driven forward by the work-force themselves, and it is vital that as a manager, this message is reiterated throughout the change process. It is also important to focus on what individuals and teams are doing right, allowing positive behaviours to be reinforced.

Focus for Section 2

This section of the toolkit is designed to explore the potential impact that change can have on individuals and teams. It explores in detail, ways of coping with, and monitoring the impact of change. It also looks at ways in which teams can work together to generate ideas to overcome problems which have developed from a change initiative being brought in. The following section gives an overview of the Change Curve and the implications change can have on individual’s emotional responses.
The Change Curve

When planning and implementing change it is important to take account not only the hard facts, figures and resources but also the emotional responses of those involved. The model below summarises phases that an individual can experience when undergoing changes in their organisation, team, social or domestic life.

The model can equally be applied at a team level. When teams change, which they must do in order to adapt, they also seem to follow a route closely matching that of individual change. If you understand the model you can help yourself and others to anticipate the phases and move more effectively through the change process.

The Change Curve is based on the following principles of change:

- Change is an ongoing process rather than an event.
- There is a progressive sequence of change behaviours that needs to be experienced and mastered to be effective in handling change.
- Seemingly negative behaviours such as denial, apprehension, anger, and resistance, are normal and adaptive elements in the change process.
- The progression through the phases of change represents an opportunity for growth and responsible risk taking.
Self Directed Learning Activities

Activity 1: Coping With Change

It is important to recognise that as a manager/ team leader, you will be looked upon by your team and those around you, as an ambassador for the change process. It is therefore important that you are able to identify how you yourself are coping with the change, in order for you to successfully take the process forward to your team.

This activity may take approximately 30 minutes to complete and is designed to be undertaken on an individual basis. The activity will help you to review how you are currently coping with change, and how you may react to change in the future. Your responses will highlight any areas where improvements could be made.

Procedure:

- For each of the 10 questions outlined below, circle the number that best reflects your current practice. Don’t worry if you are torn between two answers. We are looking for general trends.

- Once you have completed the questions, add up all the numbers you have circled and refer to the scoring chart on the last page of this activity.

- Note down where you feel your reaction to change could be improved, and what steps you might take to do so.
### Questions

<table>
<thead>
<tr>
<th></th>
<th>How often do you find yourself engaged in conversation with others which involves complaining about recent changes?</th>
<th>Daily</th>
<th>Weekly</th>
<th>Occasionally</th>
<th>Seldom</th>
<th>Never</th>
</tr>
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<tbody>
<tr>
<td>Q1</td>
<td>How often do you find yourself engaged in conversation with others which involves complaining about recent changes?</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
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<th></th>
<th>How often do you complain to your manager about the changes being implemented?</th>
<th>Daily</th>
<th>Weekly</th>
<th>Occasionally</th>
<th>Seldom</th>
<th>Never</th>
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<tr>
<td>Q2</td>
<td>How often do you complain to your manager about the changes being implemented?</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
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<tr>
<th></th>
<th>How often do you make suggestions to help implement changes at work?</th>
<th>Daily</th>
<th>Weekly</th>
<th>Occasionally</th>
<th>Seldom</th>
<th>Never</th>
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<tbody>
<tr>
<td>Q3</td>
<td>How often do you make suggestions to help implement changes at work?</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
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<th></th>
<th>How often do you speak positively about the changes being made?</th>
<th>Daily</th>
<th>Weekly</th>
<th>Occasionally</th>
<th>Seldom</th>
<th>Never</th>
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<tr>
<td>Q4</td>
<td>How often do you speak positively about the changes being made?</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
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<th></th>
<th>How frequently are you perceived by others as an innovator and one of the first to try something new?</th>
<th>Daily</th>
<th>Weekly</th>
<th>Occasionally</th>
<th>Seldom</th>
<th>Never</th>
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<tbody>
<tr>
<td>Q5</td>
<td>How frequently are you perceived by others as an innovator and one of the first to try something new?</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
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### Q6. Which do you Value More: Tradition or Innovation?

1. If given the choice, I’d choose the traditional way every time.
2. I tend to stay with what’s proved successful over time.
3. I wait and see what new changes involve before making a commitment.
4. I think innovation leads to growth and development.
5. If given the choice, I would look for the most innovative way of doing things.
Q7. When Changes are Proposed, What is Your Initial Feeling?

1. My heart immediately sinks. I hate it. I am weary of it. I feel threatened by it.

2. Scepticism. I usually see the downside and I am usually resistant. I think, "Not again... This is going to add to the workload and will get in the way of our real work."

3. I’m neutral; I go with the flow. There is little I can do to influence things.

4. I know that change is inevitable and can usually see the opportunities it may bring. I take steps to establish the exact relevancy of the change programme to my department. I feel quite comfortable and know I will probably adapt fairly quickly after the initial disruption.

5. I think that change is synonymous with progress. I immediately see the benefits both for myself and for my team, and willingly take on new tasks and responsibilities.

Q8. When Communicating with Your Team:

1. I regularly communicate my personal opinions, anxieties and insecurities.

2. If honest, I can recall times I have expressed disagreement and/or resistance about pending change.

3. I try and remain neutral; I communicate the facts and leave emotion out of the equation.

4. I am always supportive of change, even if I do not fully agree with it on a personal level. I always ensure I filter out my personal anxieties and look to communicate a positive angle.

5. I see myself as responsible for my team’s morale. My attitude towards change and behaviour is therefore crucial. My ability to inspire my team and lead them through the change period is fundamental to success. I take time to prepare how I will communicate the change to my team. I actively consider how I will enthuse my team with the vision and identify in advance concerns they may have and how these can be overcome.

Q9. How Would You Describe Your Practice when Identifying Your Personal Development Needs?

1. I am an experienced professional and have reached the top of the learning curve. I tend to gloss over my Personal Development Plan and rarely identify development needs for myself. I avoid attending corporate workshops and sessions.

2. If I look back on my Personal Development Plan, there is very little identified for the coming year. However, I occasionally stumble on seminars or courses which appear relevant from year to year.
3. I make a valiant effort to identify my development needs annually. However, best intentions are usually overtaken by other things and I often find at the end of the year that only some are followed through.

4. I regularly review my development needs and often grab opportunities to keep abreast of changes and gain training in the workplace.

5. I take full responsibility for my own career and development. I am continuously reviewing my development needs and take the time to look into the most appropriate opportunities. I invest my own time and money in increasing my employability.

Q10. How Does Your Concern About Changes at Work Affect Your Home Life?

1. Very strongly
2. Considerably
3. Moderately
4. Slightly
5. Not at all
Scoring

Add up the numbers you have circled:

<table>
<thead>
<tr>
<th>Score</th>
<th>Description</th>
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<tr>
<td><strong>37 – 50</strong></td>
<td>You are a champion of change. Adaptability is a key competency of yours. You therefore feel in control the majority of the time and this confidence is likely to be mirrored in your team. Your positive attitude towards change will undoubtedly have been recognised and you are very likely to be regarded as a role model in your team.</td>
</tr>
<tr>
<td><strong>26 – 36</strong></td>
<td>You need to move from indifference or reacting negatively to change to taking more control. You will benefit personally by acquiring the skills that make you feel more in control, thereby reducing some of your stress and uncertainty. You will also find that both you and your team will get through the change process more quickly and efficiently, and benefit from exploiting the opportunities. Your team morale and reputation is likely to increase as a result.</td>
</tr>
<tr>
<td><strong>10 – 25</strong></td>
<td>Your scepticism and/or resistance has a huge influence on your team and how they, in turn, respond to impending changes. You may well feel unhappy, frustrated, or sense a lack of control. These feelings can be infectious.</td>
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</table>

Further Development:

From the questionnaire, identify 2 questions where your scores were low (between 10-25). Consider previous occasions when you have exhibited behaviour which reflects this type, and note down how your behaviour could have been adapted to cope with the change more effectively.

Take 10-15 minutes to review this with a team member / manager, noting additional changes which they suggest may also be key to adapting and improving future behaviour.

Should you wish to explore this area further, please refer to the recommended reading ‘The Liquid Thinking Survival Guide to Change’ by Damian Hughes. Alternatively you can explore the associated website www.liquidthinking.com
Activity 2: Monitoring Change – Traffic Lights

Identifying how you and your team cope with change is important at the initial stages of a change initiative, however it is also important to recognise that reaction to change will fluctuate over time and monitoring of such is therefore imperative to ensure continuity of individual and team performance.

This activity may take approximately 20 minutes to complete and is designed to be undertaken in a group setting, either with other managers, or with your team. This questionnaire is designed to provide a snapshot of how your team is responding after the announcement of a change initiative. It can also be used as an indicator of team or individual feeling during the change process, and the responses will provide advance notice of any concerns or priority areas.

Why Issue a Questionnaire?

- Questionnaires are an effective way of providing people with the opportunity to put forward their opinion whilst remaining anonymous if they wish.
- The responses can provide advance notice of any concerns or priority areas, allowing you to make decisions about what to spend most time on during the change process.

Customising the Questionnaire

The questionnaire has been designed so that it can be customised to suit your and your team’s needs and can be adapted to suit a particular change initiative that your team are going through.

Some ideas you may wish to consider for adapting the questionnaire are:

1. Additional questions specific to the change event.
2. Rer wording the questions to include terminology that is commonly used in your division/department.
3. Highlighting specific areas if you want to make them a focus of the questionnaire.
4. Increasing the space provided to answer each question if you would like more detailed responses.
5. Adding details of where to return completed questionnaires to if you wish for them to anonymous.

Using the Responses from the Questionnaire

The responses should be used as a method of ensuring that you, as a leader, listen to the concerns of your staff about improvements and change. The feedback from the questionnaires should be acted upon where necessary to demonstrate that you understand your team’s perspective and that your team understand future changes and their role in implementing them.
Monitoring Change Questionnaire

Using the traffic light grading below, complete the quick questionnaire which relates to (insert change initiative). It is important that you are honest as your answers will help us to identify any areas where we have to amend our plan or provide more information / guidance.

Please use the comments box to let us know of any additional thoughts.

Green: Confident, happy, ready to go
Amber: A little uncertain or worried
Red: Angry or extremely nervous

Completing your personal details will help us pinpoint if any concerns are specific to a particular area. However, if you’d rather remain anonymous, just leave them blank.

Name
................................................

Role
................................................

Date
................................................
<table>
<thead>
<tr>
<th>Question</th>
<th>Green</th>
<th>Amber</th>
<th>Red</th>
<th>Comments</th>
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<tbody>
<tr>
<td>How do you feel overall about the <em>(insert change initiative)</em>?</td>
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<tr>
<td>How is the morale in your area at the moment?</td>
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<tr>
<td>How would you rate the morale across the team?</td>
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<tr>
<td>How do you feel about the level of support you're receiving from your manager?</td>
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<tr>
<td>How do you feel about the level of communication you're receiving about the change?</td>
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<tr>
<td>How do you feel about the pressure of work you're under at the moment?</td>
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<tr>
<td>How do you feel generally about the overall direction the team is moving in?</td>
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Thank you very much for taking the time to respond to this questionnaire. Please return it to:

**Name**

.................................................................

**Role**

.................................................................

**Date**

.................................................................
**Activity 3: Generating Ideas to Overcome Problems Emerging from Change - SCAAMPER**

A key contributor to coping with organisational change is to ensure that all those involved / affected by the change process, are involved with key decisions and/or ways to overcome problems. Working as a team to generate ideas has been found to be more productive and successful, than if individuals are left to their own devises. Group discussion can influence direction of thought and allow individuals to bounce ideas off of one another, in the most creative of ways.

This activity will take approximately 40 minutes to complete. This is a tool that can be used to generate solutions to a problem. It works best when used in a group, where you can get ideas from others, and is especially effective in solving tricky or persistent problems that need some fresh ideas. Be mindful of group size, so the idea is to keep the session punchy and inclusive for all participants.

**Procedure:**

1. Introduce the activity and its purpose to the team, by explaining that this tool looks at eight different ways of generating ideas to improve a service.

2. It is a great way of generating alternatives to deal with specific problems, and relies on ideas generated by the group (the more ideas the better).

3. Identify a specific problem or issue relating to an aspect of service. It could be that a key process is not working effectively, that you have had complaints about an aspect of the social work service from a community representative, or that something offered by the team, or a partner organisation, is not being used sufficiently.

4. Once you have identified a specific area of service, appoint a person who will be responsible for walking the group through the appropriate stages of the tool, asking questions, and keeping time.

5. You may want to get the facilitator to capture all the ideas on a flip chart or piece of paper, or invite the group to write down all the ideas themselves using post it notes or a flip chart.

6. The facilitator invites the group to answer the following questions one at a time, spending 2 or 3 minutes on each SCAAMPER letter:

**SCAAMPER**

**Substitute** – Can we substitute anything for the service or in the service? Consider substituting processes, materials or people e.g. if the service of a partner organisation has come under question, share ideas of other partner organisations which could be utilised as an alternative.

**Combine** – Can we combine the service with something? Consider combining processes, equipment,
resources and people to create synergy. e.g. sharing good practice with adult social care teams across the region. By combining expertise and sharing knowledge particularly in areas of specialism, can we streamline processes.

Adapt – How can we adapt the service for the customer or community? Consider what could be changed or amended to make things simpler, quicker or more effective. Is this situation similar to another where different approaches are used, and can be applied to this situation? Could the language, complexity or even colour of something be changed to improve it? e.g. could a multitude of communication methods be used to reinforce messages to the general public? Or, could, for example, the new process of SDS be communicated in a pictorial way in order for individuals to understand the overall process, and the varying levels that they can become involved in the process, more clearly?

Access – How can we make the service more accessible to the customer? Consider how and when people like to access the service. Are there spikes in demand, common patterns of usage, or barriers to some community groups accessing services? Are there few Adult Social Care workers who can offer specialist services and if so how can you build capability in others to help? e.g. ensuring that clients and carers are aware that there is an out of hours service, reassuring them that the service has links with other professionals and agencies from both the social and health care sector. Are these links with partner organisations as strong as they can be? If not, what can be done to improve working relationships to ensure out customer’s and carer’s needs are met.

Maximise or Minimise – How can we maximise or minimise the service? Consider how the frequency or volume of activities can be changed or how increasing or decreasing the speed can improve things? e.g. communicating key successes more regularly, both internally within the Council to build confidence and trust, and externally to raise the profile of the Adult Social Care sector. Alternatively, FAQ’s could be posting on the Council website, and associated local websites or community notice board to reduce general telephone enquiries to the contact centre.

Put to other use – How can we put the service to another use? Consider who or where else the service could be used. What good ideas or innovations can be tried out in other shifts, areas of Adult Social Care or communities?

Eliminate – How can we eliminate some aspect of the service? Often going back to the fundamentals of a service can strip away unnecessary or wasteful elements, like how struggling sports teams often go ‘back to basics’ when starting a recovery. Consider what you would do if the Adult Social Care division was your own business? What if a process didn’t exist and you had to start from scratch? What if only half the people were involved in delivering a service?

Rearrange or Reverse – What happens if we rearrange or reverse the service? Consider turning the tables, or looking at a process or service from back to front. What would happen if you contacted people to ask them about the service rather than wait for customers to come to you or complain? What if the most junior person in the room chaired the meeting not the most senior?
Review Activity:

This review activity will take approximately 10-15 minutes to complete and is a useful way of consolidating the ideas generated, and ensuring that action is taken to address any issues.

- Review all the ideas and select the top three that can be tried out or developed to improve the service or help solve the problem.

- Agree when you would like to try out the new ideas and who will be responsible for implementing them.

- Agree a date to meet again to review how effective the ideas have been when put into practice. Ensure you gather and take into account feedback from customers who use the service and/or people in the target audience.

Further Development:

- The process can be effective in reviewing services or products that are well established and working well, in order to freshen them up, promote them to different groups, improve them further, or share good practice with others.

- If you wish to explore the concept of ‘SCAAMPER’ further, please refer to the book ‘The Leader’s Guide to Lateral Thinking Skills’ by Paul Sloane (see reference section).
The following suggestions provide a checklist to help you deal with reactions to change and can be used to prepare yourself and your team for implementing change, either enforced change from above, external, or self-imposed with the team.

1. **Involve your team** wherever possible. By consulting with and involving your team from the outset, you will go a long way towards gaining their support.

2. **Organise regular planning and feedback meetings** to discuss the change. Check to make sure that people know and understand the planned change and their roles within it.

3. **Help your team to open up.** Be sensitive to people’s feelings and allow them time for their concerns to be expressed.

4. **Stress the new opportunities** that the change will bring, although you should also draw attention to the things that will remain the same.

5. **Remain positive.** If change has been imposed on you with little or no consultation, don’t convey that negativity to your team.

6. **Ensure your team have sufficient support** to help them adopt the changes required.

7. **Help your team adapt to the change.** As the shock of the new change sinks in, people will begin to adjust to the changes.

8. **Keep dialogue flowing.** You may need to repeat the reasons for change over and over again. People may need to hear it, even if you feel that the message was clear and consistent the first time. Remember, communication is only as good as the response it gets.

9. **Provide ways of measuring progress** towards the change goals that have been made. Share and review them with your team.

10. **Identify any individual or team training needs** that arise from the changes and ensure that the training is delivered.
Additional Learning Resources

Short Reads

Our Iceberg is Melting: Changing and Succeeding Under Any Conditions, John Kotter, St Martin’s Press, 2006
This charming story about a penguin colony in Antarctica illustrates key truths about how to deal with the issue of change: handle the challenge well and you can prosper greatly; handle it poorly and you put yourself at risk.

Managing Personal Change: Moving Through Personal Transition, Cynthia D. Scott, Course Technology Inc, 2004
"Managing Personal Change" will help you understand your reactions to change while suggesting ways you can respond more positively and productively through transition periods.

Managing Change Step by Step: All You Need to Build a Plan and Make it Happen, Richard Newton, Prentice-Hall, 2007
Change Management is not a single, coherent and agreed upon approach but rather an assortment of tools, techniques, methods and simple good intentions - all of which are simply and practically broken down by this book.

The Liquid Thinking Survival Guide to Change, Damian Hughes, 2008
Brimming with entertaining stories, fascinating ideas and helpful hints about how to thrive in the face of life's constant changes and challenges, this book is an absolute must-read.

Who Moved My Cheese? An Amazing Way to Deal with Change in Your Work and in Your Life, Spencer Johnson, Vermilion, 1999
Who Moved My Cheese? is an amusing and enlightening story of four characters who live in a maze and look for cheese to nourish them and make them happy. Cheese is a metaphor for what you want to have in life - whether it is a good job, a loving relationship, money or a possession, health or peace of mind. And the maze is where you look for what you want - the organisation you work in, or the family or community you live in. This profound book will show you how to anticipate change, adapt to change quickly, enjoy change and be ready to change quickly again and again.

Text Books

Teamal Change, Barbara Senior, Financial Times/Prentice Hall, 2005
A third edition of the widely read discussion of teamal change and its implications. Clearly laid out, it covers most major types of change and includes useful case studies and references.

This textbook examines the key theories on organizational change and applies them to organizational settings through the use of experiential exercise and case studies.

A great book which focuses on key behaviours and how to motivate others to want to make changes and overcoming reluctance. A broad range of in depth and simple examples and ideas of how to get important messages across to people in any circumstances.
Web Links & Other Resources

http://www.cipd.co.uk/subjects/corpstrty/changemmt/
A link to the Chartered Institute of Personnel & Development’s resources on change management, including factsheets, research, books, courses and more.

http://www.managingchange.biz/manage_change_resistance.html
This website provides a useful article outlining the causes of resistance to change and ways of dealing with it.

http://www.liquidthinker.com/
This link gives an overview of the work by Damian Hughes, giving reference to courses and events also available.

http://www.cipd.co.uk/podcasts/_articles/_makingchangeworkpart1.htm?link=title
In the first of a two-part podcast, the CIPD talks to experts and some very different case studies to understand the nature of change and various reasons for team change.
Section 3 – Motivation and Engagement

Implications of Disengagement

It should come as no surprise that engaged employees are good for business. The more engaged the employee, the more likely they are to stay in their job and to go the extra mile for their organisation. Mike Johnson, author of ‘The New Rules of Engagement’, states that on average two-thirds of highly engaged employees will plan to stay with their current employer, compared to only one-third of the moderately engaged and just one-tenth of the disengaged. Furthermore, if an organisation can nurture moderately engaged employees into a state of high engagement, they will be twice as likely to stay, and put in more discretionary effort while they are there. Improving employee engagement levels can therefore reduce recruitment costs and sickness levels dramatically and minimise work disruption.

Engaged employees feel inspired, energised and motivated to give their best and hence employee engagement is central to retaining key talent and to securing sustained high levels of individual, team and organisational performance. The way we lead, organise and manage people frequently results in disengaged, frustrated and demotivated individuals whose potential is under-utilised and whose performance is sub optimal. Disengaged workers, far from being advocates for their company, talk them down and when their job is customer-facing, are not surprisingly poor at delivering great customer service. Too often we adopt a rigid, mechanistic approach to people and organisations, particularly in times of uncertainty and change. As a consequence we fail to recognise employees’ needs and aspirations and harness their unique talents.

The Links Between Motivation and Engagement

In order for managers and team leaders to motivate and engage employees in the right way, they need to know what makes their staff tick and this needs to be measured and linked to the reward structure. Employees join organisations for a reason, but it may well be different motivators they are looking for to be persuaded to stay. This might mean greater financial rewards, but non-financial incentives can also aid engagement and are important to recognise. Knowing your team and applying the right management approach can lead to a better organisational culture and greater employee engagement. This employee satisfaction manifests itself in greater customer service, creating happy and loyal customers who will inevitably endorse and promote the services provided by the individuals involved.
Focus for Section 3

This section of the toolkit is designed to help you to explore your own, and your team’s levels of motivation, and the impacts this may be having on employee engagement. The four activities outlined look at exploring motivation, a review of new and innovative ways of motivating your team, and looking specifically at employee perceptions on work-life balance.
**Self Directed Learning Activities**

**Activity 1: Exploring Motivation**

What motivates individuals and makes a great workplace? Is it pay, benefits? Is it too complex to understand? Traditionally, management believed that people will always dislike work, and when they are at work, they will always want to be somewhere else. A huge amount of research has been conducted in this field into what really motivates people in modern organisations.

This activity will take approximately 40 minutes to complete and is designed for you to be able to dig deep into what really motivates individuals of your team. The activity can be undertaken as a group and distributed to your whole team, or utilised in a one-to-one situation where you feel a member of your team is lacking in self-motivation.

**Procedure:**

1. Distribute the below 12 questions to your team or, as mentioned above, to an individual of the team as part of their one-to-one.

2. Once complete, review the answers to the questions. Positive responses to the questions are shown to link very strongly to higher productivity, profitability, employee retention and customer satisfaction.

3. Take the time to reflect on any negative answers which were drawn upon and consider the reasons why these responses were negative and what can be done to help the individual to re-focus in a more positive way. It is advised that this process needs to be addressed together and coaching may be a way of exploring remedies to the negativity. (see section 6 for further guidance on coaching).
1 Do I know what’s expected of me at work?
Expectations are the milestones we use to measure our progress and, within the workplace, those milestones mark the pathways that guide us toward achievement. If expectations are not clear, we are hesitant, indecisive, and unsure of ourselves.

What can I do to get a yes?

2 Do I have the materials and equipment I need to do my work right?
We have all been in the frustrating position facing an expectation without having the tools necessary to achieve it. For employees, the importance of having the materials and equipment they need to do their jobs right is very important.

What can I do to get a yes?

3 Do I have the opportunity to do what I do best every day?
Full human potential is realised only when people are in a position to use their talents and strengths. Great performance is found when an individual's natural talents fit his or her role. Matching the right person with the right job is a significant challenge manager’s face.

What can I do to get a yes?
4 In the last 7 days, have I received praise or recognition for good work?
Praise and recognition are essential building blocks of a great workplace. We all possess the need to be recognised as individuals, and to feel a sense of accomplishment. Recognition doesn’t have to be complicated, but it is one of the items that consistently receives the lowest ratings from employees.

What can I do to get a yes?

5 Does my supervisor, or someone at work, seem to care about me as a person?
Research indicates that employees don’t leave companies, they leave managers and supervisors. The impact that a supervisor has in today’s workplace can be either very valuable or very costly to the organisation and the people who work there.

What can I do to get a yes?

6 Is there someone at work who encourages my development?
The innate yearning to learn and grow is natural to human beings. Our jobs allow us to encounter new situations and find new ways to overcome challenges every day. Why, then, do we have a tendency to stall or stagnate?

What can I do to get a yes?
7 At work, do my opinions seem to count?
All employees want to feel that they are making significant contributions to their workplaces. The ways organisations hear and process employees' ideas will shape, to a large degree, whether or not they feel valued for their contributions.

What can I do to get a yes?

8 Does the mission/purpose of my company make me feel like my work is important?
A deeply felt sense of purpose in life leads to excellence. Human beings want to belong to something of significance and meaning. They want to know they are making a difference, contributing to an important endeavour. The best workplaces give their employees a sense of purpose, help them feel they belong, and enable them to make a difference.

What can I do to get a yes?

9 Are my colleagues committed to doing quality work?
Highly productive employees tell us there is a vast difference between being assigned to a team and actually identifying with that team. It's a common experience; our manager assigns us to a workgroup and our name is added to the schedule. Just because our names are added, however, doesn't mean that we psychologically join the team, especially if we are afraid the other members don't share our commitment to producing quality work.

What can I do to get a yes?
10 Do I have a best friend at work?
Human beings are social animals, and work is a social institution. Long-term relationships are often formed at work; networking relationships, friendships, even marriages. In the best workplaces, employers recognise that people want to forge quality relationships with their colleagues, and that company loyalty can be built from such relationships.

What can I do to get a yes?

11 In the last six months, have I talked with someone about my progress?
We have all faced the infamous job performance review. Typically, the first two minutes are focused on what the manager likes about us and our work, and the remaining 58 minutes are spent on our “areas of opportunity” (the areas in which we’re weak and should improve).

What can I do to get a yes?

12 At work, have I had opportunities to learn and grow?
The need to learn and grow is a natural instinct for human beings. We can learn and grow by finding more efficient ways to do our jobs. Where there is growth, there is innovation, and this is a breeding ground for more positive and refreshing perspectives toward others and ourselves.

What can I do to get a yes?
Activity 2: Exploring Engagement

By exploring employee engagement you will be able to identify your own source of motivation, and that of your team. By recognising different sources of motivation for individuals, you as a manager will be in a better position to select appropriate methods of influencing given situations.

This individual activity will take approximately 20 minutes to complete and is designed to help you to explore your own motivation. Your own approach to motivation will have a major impact on how you try to influence and communicate with others. The combination of your approach and that of the individual(s) with whom you wish to communicate, will make the situation even more complex. Knowing your own motivational orientation can be a useful starting point when seeking to improve your communication with others.

Procedure:

1. Read through all the statements and tick those which best describe you.

2. Take the Response Grid below and circle those numbers which correspond to the statements that you ticked. You should find that your answers cluster around one column. This reveals your motivational orientation.

3. The sheet entitled ‘Interpretation’ briefly describes the approach which you have identified.

N.B If you wish to facilitate a one to one feedback session, where you encourage a discussion with a team member about his/her motivations, you can use the facilitators response grid, which will give you a complete run-down of the behavioural characteristics attached to each orientation.
**What Motivates You? Statements**

1. I like to set realistic challenges and get things done.
2. I tend to behave non-assertively.
3. I am concerned about how others regard me.
4. I tend to dominate conversations.
5. I am systematic in my approach to tasks.
6. I avoid cold people, and dislike indifference.
7. I want others to see me as effective at work.
8. I like to act as a representative for the group.
9. I am businesslike and prefer dealings to be to the point.
10. I tend to start conversations with a social discussion.
11. I am cautious about changes which will affect me.
12. I enjoy public recognition for my successes.
13. I take great pride in a completed task.
15. I set targets that can be comfortably met.
16. I take any opportunity to present ideas to management.
17. I am good at taking risks.
18. I actively seek out company.
19. I react to rather than initiate opinions.
20. I will volunteer for leading positions.
21. I actively plan my own development and progression.
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<td>22.</td>
<td>I avoid conflict with others, if possible.</td>
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<td>23.</td>
<td>I wait until I know people well before I introduce new ideas.</td>
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<td>24.</td>
<td>I am concerned about my status at work.</td>
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<td>25.</td>
<td>I look forward to performance reviews.</td>
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<td>26.</td>
<td>I dislike silences, and try to keep conversations going.</td>
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<td>27.</td>
<td>I play safe when making decisions.</td>
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<td>28.</td>
<td>I form opinions quickly, and try to persuade others to share those opinions.</td>
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<td>29.</td>
<td>I like to set measurable targets.</td>
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<td>30.</td>
<td>I try to create warm personal relationships.</td>
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<td>31.</td>
<td>I am concerned about the organisation’s financial soundness.</td>
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<td>32.</td>
<td>I like to have a high profile at work.</td>
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<td>33.</td>
<td>I do not work well under close supervision.</td>
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<td>34.</td>
<td>I prefer working with a group.</td>
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<td>35.</td>
<td>I lack confidence.</td>
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<td>36.</td>
<td>I like to take the lead in situations.</td>
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<td>37.</td>
<td>I enjoy new learning situations.</td>
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<td>38.</td>
<td>I sympathise with those less fortunate than myself.</td>
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<td>39.</td>
<td>I do not take criticism well.</td>
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<td>40.</td>
<td>I enjoy debating, and competing, with people.</td>
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### What Motivates You? Response Grid

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<tr>
<th>Achievement-orientated</th>
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### What Motivates You? Facilitator's Response Grid

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<tr>
<th>Achievement-orientated</th>
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Interpretation: What Motivates You?

The questionnaire is based around four distinct approaches to motivation:

1. **Achievement-orientated:** These individuals need to perform well, and are motivated by achieving challenges that they have set for themselves. Self-motivated, they take great pleasure in a job well done, and work best when they are in control of their own tasks.

2. **Affiliation-orientated:** These people need to develop and maintain good relationships with work colleagues. Highly sociable, they drive social interaction within their teams, and enjoy interaction whilst avoiding conflict.

3. **Security-orientated:** Security-orientated people need to feel that their job, and the future of the organisation, is secure. They are motivated by the recognition of their skills by others, and resist challenges in the interest of being sure that they will deliver the task comfortably. Lacking confidence, they can take criticism and conflict badly, and will generally play safe in work situations.

4. **Influence-orientated:** These people are motivated by the need to impress others through power and influence. They regularly take control of groups, and like to present their activities to management. They are consistent volunteers for leadership positions, and will try to draw others to their point of view. They enjoy debate and competition, and are keen to maintain high status at work.

Review Activity:

This 30 minute review activity can be undertaken to reflect on your own results by asking yourself the following questions:

1. What systems you need to be in place in order to maintain your own motivation? What do you need from those around you?

2. If those things are not in place how can you rectify the situation?

3. Would it help to share your results with your team or manager?
Activity 3: Motivating Your Team

By understanding what motivates and drives individuals, will allow you to be in a better position to be able to assess how best to motivate your team in order to get the most out of them.

This activity will take approximately 60 minutes to complete and is intended to be completed on an individual basis. Every team suffers from occasional dips in energy and motivation, which can affect team performance. There are many reasons why this occurs, and it can manifest itself in a number of different ways, whether it’s through a dip in performance, high levels of staff turnover, a lack of buzz in the workplace or actual feedback from your team. If you suspect your team members are feeling low, the following suggestions will help you form a plan for boosting morale and increasing performance.

Procedure:

1. Read ‘How to motivate your team’ article overleaf.

2. Working through the 6 categories think about how often you demonstrate each point, and rate yourself from 1-3 (1= all the time, 2= sometimes, 3= rarely)

3. Once complete, take your 3 lowest scores and develop a plan for each in order to increase your score. This plan may be one of the suggested ‘try to’ points or your own idea. For example you may decide you want to work on category 6 - communication and therefore your plan may be to meet with the team to discuss how you can improve communication, or you may wish to introduce a way to collect new ideas or simply organise a regular team event to catch up.
How to Motivate Your Team

It’s not always about more money...

Contrary to popular perception, almost all studies on employee motivation show that ‘compensation is not the predominant reason why people leave their jobs for supposedly greener pastures’. Rather, studies continually find that people are eager to grow and develop into their jobs, relishing new opportunities and responsibilities.

Time and again, management literature points to the creation of an optimum working environment as the most effective way of boosting morale.

It is up to you, therefore, ‘to create an optional environment... that inspires people to do their best day in and day out’.

In trying to create this optimum environment, you should give careful consideration to the following points:

1. Appreciation

Exit interviews and employee questionnaires regularly show that people often leave an employer because they haven’t received the recognition they feel they deserve, or proper feedback on how they are doing.

Expressing appreciation is the first step in creating an atmosphere that will motivate people. Such expressions should be made to all team members doing their jobs well, and not just those with responsibility for the bigger, riskier pieces of work. It is important that individuals who are doing well are brought to the attention of the team/organisation and praised for their efforts.

Recognise achievement, celebrate success.

Try to:
1. Give a team member verbal praise on immediate completion of a successful project and share this achievement with the team.

2. Be specific with any praise you give, referring to particular examples.

3. Meet regularly with individuals to review what they’ve achieved.

4. Be honest – if some aspects of the work are exemplary, whilst others could do with a little revising or fine-tuning, explain to the individual that you would like to talk this through with them.

5. Meet regularly as a team to discuss what has been achieved.

6. Celebrate team or organisational success: when a project is completed don’t rush on to the next one without first stopping to acknowledge both individual and team accomplishments.

Score: Please circle as you see appropriate following the guidance outlined in the procedure

[ ] [ ] [ ]
2. Involvement

Another point that regularly crops up in employee questionnaires is the need to feel involved in their work and important to the success of their companies. Of course, it would be completely impractical to involve everyone in every decision, discussion or project that ever takes place, but allowing for greater team member contribution, especially around initiatives that will directly affect them, gives people a sense of inclusion and importance.

In the workplace, if people are rarely involved in the decision-making process, or they are not invited to contribute their thoughts and ideas, it’s all too easy to begin to feel like a non-entity, someone that does not matter. This can have serious consequences for creativity, innovation and productivity.

Try to:
1. Involve team members in the decision-making process as much as is practical. This does not mean that team members have to start attending lots of meetings and discussion forums; it could be as simple as asking people to email you their thoughts and ideas on the topic, or having an ideas sheet on the local notice-board.

2. Encourage team members to work on projects together to lessen feelings of detachment.

3. Keep work-life balance in mind at the same time. Some people might not want to mix work and social life together too often. Also, team morale will not benefit if team members are encouraged to become involved to the extent that their workloads go through the roof.

**Score:** Please circle as you see appropriate following the guidance outlined in the procedure

1 2 3

3. **Management Concern**

Another important factor that can boost morale when people feel that management is genuinely concerned about them as an individual. Any manager/organisation that disregards the feelings, aspirations or problems of individual team members is never going to enjoy the benefits of a truly motivated workforce.

Although it is important to tread carefully when dealing with individual feelings and/or problems, people often appreciate help, even if this is just a simple show of understanding.

Try to:
1. Always consider and treat team members as individuals. Find out what interests them, both at work and in their personal lives, what their expectations are for the job and how they gain satisfaction from the work they do.

2. Ensure each individual is stretched and challenged in a way that promotes their growth and development. Set targets for your team members. These need to be both achievable and challenging, and are most effective when tailored specifically to each individual in a way that ensures they are stretched a little further each time. It’s a bit of a balancing act, though. Go too far and you’ll just create stress, leading to unhappy team members and lower productivity.
3. Encourage them to share personal problems if you suspect there are issues affecting them. Remember, very few people can leave their personal lives at home as soon as they enter the workplace. If things aren’t working in their personal lives, they’re unlikely to perform at their best.

4. Offer on-the-job coaching and training whenever possible.

5. Actively demonstrate concern for health and safety.

6. Let team members know that they are welcome to express to you any misgivings they may have about their workloads, the way the team is working together, the general state of things around the workplace, etc., and that you will address these concerns.

7. Be alert to the mood of the team and how team relationships might influence this.

**Score:** Please circle as you see appropriate following the guidance outlined in the procedure

1 2 3

4. Management Loyalty

Of all the things a team leader needs and expects, loyalty is the most important. It is difficult to motivate people and lead them anywhere, if they are not loyal. At the same time, it is vital that a leader or manager is loyal to all those he/she is leading. True loyalty is one of the best ways of ensuring morale is high.

Try to:
1. Put the welfare of team members first.

2. Offer support to team members when they are dealing with difficult customers, suppliers or clients.

3. Understand that people do make honest mistakes and be supportive when this happens.

4. Be true to your word – if you have said something to a team member, stick to it, and if unforeseen problems have occurred which mean you cannot do what you originally said, don’t just keep this information to yourself, inform the individual immediately of the situation.

**Score:** Please circle as you see appropriate following the guidance outlined in the procedure

1 2 3

5. Respect

As well as being appreciated and involved, individuals need to know that they are respected.

Try to:
1. Recognise the contribution made by each individual person as well as the contribution made by different working groups as a whole.
2. Trust people to cope with difficult pieces of work, but always be on hand to offer support if they need it.

3. Court individual opinions on pieces of work and genuinely consider what is said – don't immediately dismiss the advice just because an individual is young or lacks experience or seems to be a bit old-fashioned and conservative in their opinions.

4. Consider the skills that each individual has. It may be that a team member has experience that you don't know about, which could be really useful to a particular project or assignment. Find out what past experiences team members have had and the range of skills they possess. Once you have uncovered this information, try to assign pieces of work to their particular strengths.

**Score:** Please circle as you see appropriate following the guidance outlined in the procedure

1 2 3

6. Communication

Lack of communication, whether at the workplace or at home, is perhaps the main reason for deterioration in relationships and a slump in energy, motivation and morale. Communication is essential for keeping people informed of what is going on around them, preparing them for change, instructing them as to their responsibilities, making them aware of what is expected of them and letting them know they are appreciated.

Failure to communicate means a failure to do any of the above. A lack of communication causes morale to flag, and effective communication is one of the quickest ways to boost morale. This does not mean that a manager/leader can rely on a simple pep talk when they eventually notice a slump in the level of enthusiasm or energy. By this stage, it is really too late and much more drastic action will be required.

Try to:
1. Communicate with appreciation and respect.
2. Create an optimum working environment with communication at the core.
3. Involve all team members in group decisions.

**Score:** Please circle as you see appropriate following the guidance outlined in the procedure

1 2 3

**Review of Scores:**

<table>
<thead>
<tr>
<th>Motivation Category</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appreciation</td>
<td></td>
</tr>
<tr>
<td>Involvement</td>
<td></td>
</tr>
<tr>
<td>Management Concern</td>
<td></td>
</tr>
<tr>
<td>Management Loyalty</td>
<td></td>
</tr>
<tr>
<td>Respect</td>
<td></td>
</tr>
<tr>
<td>Communication</td>
<td></td>
</tr>
</tbody>
</table>
**Activity 4: Motivation and Work-Life Balance**

Over recent years, the term work–life balance has become increasingly popular in the word of organisational development and a number of organisations have been seen to introduce significant work-life balance measures into their working practice.

Work–life balance is about individuals being able to achieve their own optimum arrangement between personal and career objectives, while continuing to satisfy business needs. Work–life balance is about both empowering employees with control and choice over their working lives, and helping businesses to operate more efficiently. Work–life balance was long dismissed by many as a soft option for female employees with young children. Now, however, most people recognise that work–life balance can have benefits for employees of both sexes and all age groups, not just those with children.

This individual activity will take approximately 60 minutes to complete. The concept behind this activity, is that individuals bring their ‘whole selves’ to their work, using wisdom gained outside of work to help them, and utilising support of friends and family. Although sometimes regarded as separate parts of our lives, they are clearly inter-dependent. This activity can be used to explore this further by looking at personal motivation and priorities in a number of areas related to work–life balance. It will allow you to clearly identify what you would like from your career and your life, and encourage you to think about how to make any changes you deem necessary.

**Procedure:**

This activity is broken up into two sections: work and lifestyle. Both sections present a number of choices/descriptions.

1. Look at the section on work. Pick the five things you think are most important and list them in the spaces provided. Then do the same for the section on lifestyle.

2. Having made your lists from the choices in both sections, prioritise them from one to ten, with one being the most important to you.

3. After you have done this, review your results and attempt the further questions provided.
### Work

<table>
<thead>
<tr>
<th>Time flexibility</th>
<th>High salary</th>
<th>Promotion</th>
<th>Benefits/Perks</th>
<th>Autonomy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal interest</td>
<td>Training/Education</td>
<td>Stability</td>
<td>Regular hours</td>
<td>Make a difference</td>
</tr>
<tr>
<td>Travel</td>
<td>Ethical business</td>
<td>Status</td>
<td>Family-oriented business</td>
<td>Entrepreneurial business</td>
</tr>
<tr>
<td>Informal atmosphere</td>
<td>Meet people</td>
<td>Professional atmosphere</td>
<td>Work with people</td>
<td>Irregular hours</td>
</tr>
<tr>
<td>Recognition</td>
<td>Use your skills</td>
<td>Overcome difficulty</td>
<td>Work from home</td>
<td>Early retirement</td>
</tr>
</tbody>
</table>

#### Top five work priorities

1. 
2. 
3. 
4. 
5. 

### Lifestyle

<table>
<thead>
<tr>
<th>Health</th>
<th>Happiness</th>
<th>Parenting</th>
<th>Community involvement</th>
<th>Hobbies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial stability</td>
<td>Material things</td>
<td>Helping others</td>
<td>Spirituality</td>
<td>Free time</td>
</tr>
<tr>
<td>Friends</td>
<td>Independence</td>
<td>Relationships</td>
<td>Caring for family</td>
<td>Culture</td>
</tr>
<tr>
<td>Physical fitness</td>
<td>Quiet life</td>
<td>Respect for others</td>
<td>Sport</td>
<td>Excitement and surprises</td>
</tr>
<tr>
<td>Self-improvement</td>
<td>Education</td>
<td>Meeting people</td>
<td>Responsibility</td>
<td>Social advancement</td>
</tr>
</tbody>
</table>

#### Top five lifestyle priorities

1. 
2. 
3. 
4. 
5.
Overall Top 10

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

Further Questions

1. Are your top five choices on the list work or lifestyle-oriented?
2. Is your ideal situation very different from reality?
3. Are you letting your priorities slip?
4. Can you change your behaviours?
5. Are there complementary choices?

Use this information to set yourself three goals which will help you to move towards your ideal situation:

1.
2.
3.

Further development:

Here are some ideas to build on the exercise should you wish:

- Set yourself a time to review the progress against your goals, perhaps in 3 or 6 months from now. Think about how you will reward yourself for completing some of your goals.

- Sit down and discuss your priorities with a person or persons who you are very close to. This can be very helpful for getting support and encouragement for any big shifts you want to make in your lifestyle e.g. being more healthy or spending more time with family.

- Make sure your goal(s) are prominent in your mind, and take steps to remind yourself e.g. write them into your notebook or diary where you will see it, or stick a note with a key goal on the fridge door.

- Read 'Principle Centred Leadership' by Steven Covey.
Tips and Techniques

Below are a number of quick and easy steps which can be taken, on an individual basis, to explore the concept of motivation and engagement with your team. The ideas can be used at team meetings or as team building events set aside from the team’s every day work.

1. Think about who has inspired you at work and arrange a discussion with them to discuss their practice and approach.

2. Challenge your team to find one piece of inspirational material in any form such as video clips of Inspirational leaders (e.g. Barack Obama – You Tube) or quotes or songs etc. Arrange a group session where you ask each individual to share their inspirational material explaining why they choose it.

3. Build in time during 1:1’s to find out how those you work with would describe inspirational leadership? Have they ever had an inspirational leader? Take some time to reflect and ask yourself how do I match up?

4. Find out what individuals in the team find de-motivating at work and organise time to work on these challenges together, facilitate the process encouraging the team to find solutions and try out new ideas together.

5. Reflect on each individual in your team and ask yourself what they bring to the team that makes them special, what are their natural skills, what talents do they have? Now look out for examples of them demonstrating their strengths and take the opportunity to give them some honest positive feedback.

6. Gather your team together to think about how the team is perceived by the rest of the organisation, work together to identify ways in which you could improve this perception, develop a plan of action to take advantage of opportunities that lie ahead.

7. Set aside some time to carry out some internet research to investigate what Maslow’s hierarchy of needs is, think about how this model gives us insight into motivating others and how you can apply this knowledge in work.

8. Work with individuals in your team to help them identify activities that will stretch them and take them out of their comfort zone whilst learning new skills.
Additional Learning Resources

Short Reads

The Motivation Pocketbook (Management Pocketbooks) by Max Eggert (Author), Phil Hailstone (Illustrator)
This pocketbook examines different theories of motivation, drawing out key points and offering management tips for each one. It provides pointers on the best theories to use in particular situations and looks at what individual personalities are likely to find motivational.

Rules of Engagement: Life-work Balance and Employee Commitment by Mike Johnson
This book offers practical remedies for rebuilding the psychological contract between employers and employees, aimed at regaining commitment. Johnson argues that although trust has vanished from the workplace there are ways to develop a new psychological contract between employer and employee. This book offers practical, down-to-earth solutions that human resource and general managers can use to re-energise the employees and themselves.

Text Books

Motivate Teams, Maximize Success: Effective Strategies for Realizing Your Goals (Positive Business), by Melba Levick and Michael West
This book covers aspects of team management such as developing your own style of team leadership; managing difficult people and handling personality conflicts; shaping your team's vision and objectives; and motivating teams to maximise success. Includes practical suggestions and step-by-step work solutions.

Leadership and Motivation: The Fifty-fifty Rule and the Eight Key Principles of Motivating Others by John Adair
This book really tries to get to the bottom of what leadership and motivation is all about, including theory and many practical tips, as well as uplifting quotes to remind you that you’re not the only person out there that finds being a manager difficult.

First, Break All The Rules by Marcus Buckingham & Curt Coffman
Great managers do not help people overcome their weaknesses. They do not believe that each person has unlimited potential. They do play favourites and they break the 'Golden Rule' book everyday. This amazing book explains why great managers break all the rules of conventional wisdom. The front-line manager is the key to attracting and retaining talented employees. No matter how generous its pay or how renowned its training, the company that lacks great, front-line managers will suffer. Great managers are the heroes of this book. Vivid examples show how, as they select, focus, motivate and develop people, great managers turn talent into performance. Finally, the authors have distilled the essence of good management practice into twelve simple questions that work to distinguish the strongest departments of a company from all the rest. This book is the first to present this essential measuring stick and to prove the link between employee opinions and productivity, profit, customer satisfaction, and the rate of turnover.
Web Links & Other Resources

A link to the Personnel Today website which outlines numerous articles relating to teamwork, this one may be of particular interest as it looks at how to encourage teamwork.

http://www.blessingwhite.com/research.asp?pid=1
This link is a useful tool for exploring interesting reports on states of employee engagement. It also gives an insight into the world of coaching.
Section 4 – Leadership

All organisations need good leadership. Organisations with strong leadership tend to be more productive, competitive and responsive to change. Their employees have a clearer idea of where they are heading and why, and are therefore more engaged and motivated. Last, but not least, organisations that excel at developing leaders tend to achieve higher long-term profitability.

In its simplest form, a leader is someone who has followers. Therefore, anyone who can influence people to follow them has leadership qualities. Leaders, of course, appear at all levels within organisations, they are not just those people working in identified leadership / management positions.

The Distinction Between Leadership and Management

The terms ‘leadership and management’ are often used interchangeably. However, they are two distinctive, yet complementary, processes. Management has been described as attainment of organisational goals in an effective and efficient manner through planning, organising, staffing, and directing and controlling organisational resource. Individuals in management positions are required to use classic management techniques, while at the same time, exercise what might be more usually termed leadership traits. This would involve creating a compelling vision, inspiring and motivating, behaving strategically, and leading change and transformation. Leadership and management are therefore not mutually exclusive activities, but are much more likely to be exercised situationally, depending on what circumstances dictate.

Situational Leadership

There are many models and theories that have been developed on leadership, a few of which were discussed on the Cultural Leadership event. One of the main theories explored was Hersey & Blanchard’s theory on Situational Leadership (1982). Situational Theory dictates that a leader should acquire a variety of different styles that they can choose to apply according to the situation. Hersey & Blanchard’s Situational Leadership Theory takes into account the maturity of subordinates when determining the style of leadership necessary. For inexperienced, unskilled staff, a large degree of direction is required, whilst experienced staff can be afforded more autonomy.

Situational leadership is described in terms of four distinct readiness levels. Readiness levels are the different combinations of ability and willingness that people bring to each task. The amounts of ability and willingness, from very high to very low, form four benchmark levels of readiness split into two possibilities, as can be seen on diagram 1 overleaf. Diagram 2 overleaf allows you to match an individual’s readiness with their leadership style, and provides a descriptor of how that individual should be led. Diagram 3 on the following page, demonstrates a pictoral representation of this.
Diagram 1

<table>
<thead>
<tr>
<th>R3</th>
<th>R2</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Able but Unwilling</strong></td>
<td><strong>Unable but Willing</strong></td>
</tr>
<tr>
<td>The follower has the ability to perform the task, but is not willing to use that ability.</td>
<td>The follower lacks ability but is motivated and making an effort.</td>
</tr>
<tr>
<td><strong>Able but Insecure</strong></td>
<td><strong>Unable but Confident</strong></td>
</tr>
<tr>
<td>The follower has the ability to perform the task, but is insecure or apprehensive about doing it alone.</td>
<td>The follower lacks ability, but is confident as long as the leader provides guidance.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>R4</th>
<th>R1</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Able and Willing</strong></td>
<td><strong>Unable and Unwilling</strong></td>
</tr>
<tr>
<td>The follower has the ability to perform and likes doing the job.</td>
<td>The follower is unable and lacks commitment and motivation.</td>
</tr>
<tr>
<td><strong>Able and Confident</strong></td>
<td><strong>Unable and Insecure</strong></td>
</tr>
<tr>
<td>The follower has the ability to perform and is confident about doing it alone.</td>
<td>The follower is unable and lacks confidence.</td>
</tr>
</tbody>
</table>

(Hersey, 97)

Diagram 2

<table>
<thead>
<tr>
<th>Matching Style and Readiness</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Readiness</strong></td>
</tr>
<tr>
<td>-------------------------------</td>
</tr>
<tr>
<td><strong>R1</strong></td>
</tr>
<tr>
<td>Unable and unwilling or insecure</td>
</tr>
<tr>
<td><strong>R2</strong></td>
</tr>
<tr>
<td>Unable but willing or confident</td>
</tr>
<tr>
<td><strong>R3</strong></td>
</tr>
<tr>
<td>Able but unwilling or insecure</td>
</tr>
<tr>
<td><strong>R4</strong></td>
</tr>
<tr>
<td>Able, willing and confident</td>
</tr>
</tbody>
</table>

(Hersey, 97)
Focus for Section 4

This section of the toolkit focuses on identifying different leadership styles and the impact that these can have on getting the most out of your team. It also explores the traits of inspirational leaders and looks closely at influencing styles and their implications when used.
**Self Directed Learning Activities**

**Activity 1: Leadership Style Questionnaire**

Everyone has their own approach to leadership, and it is often necessary to change approach according to context. However, in order to understand how you as a leader need to adapt your style and approach when leading your team, it is important that you first have a sound understanding of your current preferred leadership style.

This activity will take approximately 40 minutes to complete and is designed to help individuals identify their preferred style(s) of leadership and the situations in which each of the styles are appropriate. It can form the basis of a personal development plan to enable individuals to change or enhance their approach to learning.

The questionnaire is a useful tool for current managers, though can also be used within teams to identify future potential leadership styles.

**Procedure:**

1. Ask all team members to complete the questionnaire, by placing a score against each statement in the right-hand column, using the following scores:

   - This statement is least like me Score 1
   - This statement is next least like me Score 2
   - This statement is next most like me Score 3
   - This statement is most like me Score 4

2. As a tip, score the statement most like you first, then the statement least like you and the two in-between statements last.

3. On completion of the 12 sections, insert individual scores into the summary sheet.

4. Add up the scores for each column, (a) to (d).

5. The column with the highest total score will be individual's preferred leadership style.
6. The ‘Interpretation’ sheet at the end of the questionnaire provides a brief overview of each of the four styles identified by the activity.

7. If one style has scored more heavily than the rest, this is the style with which you are definitely most comfortable. If you have two or three scores that are close together, it is likely that you are flexible, being able to move between a number of styles quite easily.
**Leadership Style Questionnaire**

<table>
<thead>
<tr>
<th>Question</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Decision-Making</strong></td>
<td></td>
</tr>
<tr>
<td>(a) I make the decisions and announce them.</td>
<td></td>
</tr>
<tr>
<td>(b) I make the decisions but announce how and why I made them.</td>
<td></td>
</tr>
<tr>
<td>(c) I ask my colleagues for their ideas before making the decisions.</td>
<td></td>
</tr>
<tr>
<td>(d) I set clear parameters within which my people are allowed to make their own decisions.</td>
<td></td>
</tr>
<tr>
<td><strong>2. Sharing Information</strong></td>
<td></td>
</tr>
<tr>
<td>(a) I pass on information only if it is unavoidable.</td>
<td></td>
</tr>
<tr>
<td>(b) I share with the team only the information I feel is relevant.</td>
<td></td>
</tr>
<tr>
<td>(c) I try to answer colleagues questions openly and honestly.</td>
<td></td>
</tr>
<tr>
<td>(d) I make available all information, apart from that which is personally or commercially sensitive.</td>
<td></td>
</tr>
<tr>
<td><strong>3. Delegation</strong></td>
<td></td>
</tr>
<tr>
<td>(a) As a general rule I do not delegate.</td>
<td></td>
</tr>
<tr>
<td>(b) I delegate occasionally, but when I do I follow up carefully.</td>
<td></td>
</tr>
<tr>
<td>(c) I delegate regularly, to colleagues who have demonstrated that they can handle it.</td>
<td></td>
</tr>
<tr>
<td>(d) I use delegation as a means of developing new skills in others.</td>
<td></td>
</tr>
</tbody>
</table>
### 4. Degree of Autonomy

<table>
<thead>
<tr>
<th>Question</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>(a) I am always closely in control of how people go about tasks in my team.</td>
<td></td>
</tr>
<tr>
<td>(b) I suggest how people should go about their work, but am prepared to listen to alternative suggestions.</td>
<td></td>
</tr>
<tr>
<td>(c) I encourage people to think about how to go about their work and ask them to agree it with me.</td>
<td></td>
</tr>
<tr>
<td>(d) I set objectives, but let people decide themselves how they will achieve them.</td>
<td></td>
</tr>
</tbody>
</table>

### 5. Standards of Work

<table>
<thead>
<tr>
<th>Question</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>(a) I lay down the standards I expect to be achieved.</td>
<td></td>
</tr>
<tr>
<td>(b) I explain why standards have been set as they are.</td>
<td></td>
</tr>
<tr>
<td>(c) I communicate standards, but allow colleagues to have their say.</td>
<td></td>
</tr>
<tr>
<td>(d) I help colleagues to identify appropriate standards for their jobs.</td>
<td></td>
</tr>
</tbody>
</table>

### 6. Management of Change

<table>
<thead>
<tr>
<th>Question</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>(a) When change is forced on me, I tell people exactly how we are going to respond to it.</td>
<td></td>
</tr>
<tr>
<td>(b) I try to explain the reasons for change.</td>
<td></td>
</tr>
<tr>
<td>(c) In responding to change, I ask my colleagues for their ideas.</td>
<td></td>
</tr>
<tr>
<td>(d) I expect my colleagues to come up with suggestions for handling change situations.</td>
<td></td>
</tr>
<tr>
<td>Question</td>
<td>Score</td>
</tr>
<tr>
<td>----------</td>
<td>-------</td>
</tr>
<tr>
<td><strong>7. Response to Mistakes and Errors</strong></td>
<td></td>
</tr>
<tr>
<td>(a) When mistakes occur, I find out who is responsible and make it clear that they will not be tolerated.</td>
<td></td>
</tr>
<tr>
<td>(b) My main concern when mistakes occur is that people understand why they made them.</td>
<td></td>
</tr>
<tr>
<td>(c) When mistakes occur, I ask people how they would do things differently if the same situation happened again.</td>
<td></td>
</tr>
<tr>
<td>(d) I do not mind some mistakes, as long as people use them as genuine learning situations.</td>
<td></td>
</tr>
<tr>
<td><strong>8. Attitude to Risk-taking</strong></td>
<td></td>
</tr>
<tr>
<td>(a) I try to operate in a way that removes all possible risk.</td>
<td></td>
</tr>
<tr>
<td>(b) I only take carefully calculated risks.</td>
<td></td>
</tr>
<tr>
<td>(c) I am prepared to take reasonable risks, provided I am able to put a contingency plan into place.</td>
<td></td>
</tr>
<tr>
<td>(d) I am happy to undertake risky ventures if the potential benefits are high.</td>
<td></td>
</tr>
<tr>
<td><strong>9. Approach to Conflict</strong></td>
<td></td>
</tr>
<tr>
<td>(a) I try to prevent conflict in any of my dealings.</td>
<td></td>
</tr>
<tr>
<td>(b) Where conflict occurs, I try to quickly sort it out.</td>
<td></td>
</tr>
<tr>
<td>(c) I feel reasonably relaxed about conflict, provided I have the situation under control.</td>
<td></td>
</tr>
<tr>
<td>(d) I encourage constructive tension, provided it leads to new ideas.</td>
<td></td>
</tr>
</tbody>
</table>
### Question 10. Developing People

(a) I agree to training if there is no other way of handling the situation.

(b) I think training should only address the requirements of a colleague’s immediate job.

(c) I allow people to attend training courses not directly related to their current job, provided they can make out a good case for it.

(d) I encourage people to look for development opportunities.

### Question 11. Communication

(a) I tell my colleagues what they need to know.

(b) When communicating, I am most concerned about passing on information, but am prepared to answer any questions.

(c) Communication is about passing on information accurately, but it is important to get feedback.

(d) I believe in genuine, two-way communication.

### Question 12. Availability

(a) I prefer issues to be raised with me in writing or at formal meetings.

(b) My colleagues can raise anything with me, providing they have an appointment.

(c) My colleagues know I will make time for them, if their issue is urgent.

(d) I try to operate an approachable and visible presence at all times.
Summary Sheet: Leadership Style Questionnaire

Copy over the scores you have allocated into the appropriate point on the grid below and then total each column.

<table>
<thead>
<tr>
<th>Q</th>
<th>(a)</th>
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The column with highest total score will be your preferred leadership style. A description of each of the four styles is given overleaf.
**Interpretation: Leadership Style Questionnaire**

The four styles measured by the questionnaire are based broadly on the Tannenbaum and Schmidt Leadership Continuum and are described below:

**A) Tell**
Your approach to leadership is autocratic. You like to be in control and you issue orders and directives. Generally, you are less interested in other people’s ideas because you believe that with your experience you know best. You dislike change, risks or anything which might interfere with the harmonious running of your patch.

**B) Sell**
You generally like to be in control of your subordinates and direct the way they go about things. However, you like to explain the reasons why you do things and would prefer the agreement of your subordinates. You are risk averse, careful about to whom you communicate and delegate, but will answer reasonable questions.

**C) Consult**
Your leadership style is based on asking people’s opinions. You are genuinely interested in what they have to say and you use good ideas, but you believe that it is your responsibility to decide what is going to happen. You feel you encourage your subordinates to demonstrate initiative and come up with new ideas but you make it clear that ultimately you are in control.

**D) Join**
You can lead by allowing your people as much freedom as they can handle. You lay down clear parameters and guidelines but expect them to re-organise themselves and operate without referring everything to you. You are happy to debate most things openly and to tolerate dissent. You delegate as a matter of course and look for opportunities for their long-term progression.

**Further Development:**

The best leaders use different styles to deal with different situations. Consider the following questions to review where you can get better results with a different approach:

- Look at the style with the lowest score. In what situations can you use the style, and what would be the benefits to you and others?

- Look at the style with the highest score. What limitations does this style have? How could you adapt your style using approaches from the others styles?

- What one small change in your style would make the biggest difference to your effectiveness as a leader?
Review Activity:

1. Think about the four different styles, and reflect on those that you have identified as your preferred leadership approach. You may find the following questions helpful:

2. Has the questionnaire revealed that you tend to adopt one particular approach, or are there two or more that score highly?

3. What does this reveal about your leadership approach?

4. Does/do your identified style(s) conform to your previous perception of your leadership approach?

5. What are the strengths and weaknesses of each style?

6. Is it more effective to adopt one particular style and remain with it, or should your approach be flexible, depending on the situation?

7. In what kind of situations would each style be appropriate?

8. Are there any situations where particular styles would be inappropriate?

9. Can you think of situations in which you recently took a leadership role and analyse whether the style you used was appropriate, and consider how you could have approached it differently.

10. Record your ideas to formulate an action plan on how you can enhance your leadership style(s) in the workplace. Some useful questions might be:

11. How could you achieve an appropriate balance of the various styles?

12. What would you need to do to alter your approach?
Activity 2: What Makes an Inspirational Leader

Leaders need to become adept at formulating a progressive vision for the organisation, which takes into account the basic values shared by customers, shareholders and employees alike. Once that vision is established, leaders must embody it fully in everything they do. They also need to find ways of connecting this vision to employee performance.

Once in position, leaders need to inspire and motivate their followers towards exceeding their expectations and have the expertise to retain key talent. The most effective leaders achieve this by creating meaningful jobs fit for purpose, listening and understanding, recognising and understanding individual’s needs, and delegating and empowering others.

This activity will take approximately 45 minutes to complete and focuses on the importance of inspirational leadership. Successful leaders are those who can motivate their team and gain buy-in and commitment from team members to achieve the team’s goals. This exercise can be used to explore individual’s opinions on what makes a good leader, and what traits and behaviours we also associate with bad leaders.

Procedure:

1. Working with 4 colleagues, firstly take 10 minutes to individually think about managers who you have personally worked with throughout your career to date. Take the time to think about a manager who you perceive to be a good leader, and a manager who you perceive to be a non-inspirational leader.

2. Use this time to make notes on what traits and behaviours they displayed which led you to perceive them as either a good or bad leader. It may be helpful to recall situations when they used certain approaches, language and behaviours in their leadership style which either did or did not inspired you.

3. Take turns to present your ideas to the group giving specific examples of times when behaviours were displayed.

4. From the group discussion, formulate and agree on a list of positive and negative leadership traits.

5. Now think about your own leadership style and whether the traits you display fit into the positive or negative perceptions that the group have agreed on. Looking specifically at any negative aspects, think about how you could adapt your style of leadership in order to be perceived in a more positive light by others.

6. Finally, list a few simple steps that you will apply to ensure that your leadership approach stays on the right track when working with members of your team.
Activity 3: Emotional Intelligence and Leadership

The emotional intelligence theory states that for leaders to be able to adapt their style successfully, they must be able to tune in emotionally to their surroundings, and to themselves. This specific set of skills and attributes, called emotional competencies, can have a real impact on how you perform at work. Different combinations of these competencies result in different styles of leadership; an authoritative leader, for instance, will tend to be strong in the competencies of self-confidence, empathy and change catalyst. A good leader will, however, be able to pick and mix between these capabilities at will, and might use several of the six identified leadership styles in any one week.

This activity will take approximately 30 minutes to complete and can be utilised at you next management meeting to review perceptions on emotional intelligence and leadership styles.

Procedure:

- Review the article below which outlines 6 leadership styles, drawn from the work of Golman.

- Encourage group discussion to address the following questions:
  - What kind of impact do you feel each style would have on the workplace?
  - In what situation may each style be of benefit?
  - In which situation may each style be detrimental?
  - Which of the styles do you as a manager feel you most often demonstrate? Does this reflect what your colleague perceive?

Emotional Intelligence and Leadership Styles: Overview

1. The Coercive Leader
This is the least effective of all the styles listed. Coercive leaders are inflexible, demanding, alienating and demotivating. Their actions often result in very low staff morale. But it can be appropriate during a genuine emergency, or when a short, sharp shock is required, but should be used with great care, and never for very long.

2. The Visionary (Authoritative) Leader
The authoritative style is, overall, probably the most effective. Authoritative leaders are visionaries, able to garner commitment to that vision, and then to step back and let people get on with achieving it in the most appropriate way for them. This flexibility encourages innovation and creative thinking amongst everyone.

This is a versatile approach to leadership and is particularly suited when things are not going too well, and when the leader needs to get his/her people motivated and enthused about a new vision. Leaders should be careful, however, not to use this style when they are plainly less experienced or more junior than the group for whom they are working. They should remember that it is an authoritative style, not a domineering one, that will be effective.
3. The Affiliative Leader
The affiliative leader puts his/her people before the work that needs to be done, aiming to build loyalty and togetherness as a priority. Strong communication, trust, empathy, innovation and freedom to experiment are all evident within the workforce when the affiliative leader is in charge. The affiliative style is a good all-round approach, but it is most helpful for increasing team togetherness, improving communication or restoring trust. It often works best when used with another style, as its emphasis on praise can fail to address poor performance. This approach can also, on its own, fail to give clear direction.

4. The Democratic Leader
The democratic leader will gather people’s ideas and support, and allow employees a say in decisions. This builds trust and commitment, enables flexibility in how employees work, and maintains high morale. It works best when the leader is uncertain about which direction to take and is willing to listen to, and benefit from the ideas and guidance of other employees. The approach is less likely to work where employees lack the competence, knowledge or experience to offer sound advice. It can sometimes lead to something of a rudderless ship, with everyone holding a different view on what should happen and nobody strong enough to make a decision and run with it. Weak leaders can sometimes hide behind this style, allowing them to procrastinate or blame the absence of consensus for a lack of firm action. It can be particularly inappropriate in times of crisis, where building consensus is usually very difficult.

5. The Pace-Setting Leader
The pace-setting leader sets high personal performance standards and expects others to meet them also. Those who cannot measure up are likely to find themselves being replaced. The pace-setter does not trust their team to work in their own way or to take the initiative. The result is that the pace-setting style can destroy a positive work environment, as employees feel they will never be good enough and their morale falls. Flexibility and responsibility also disappear. However, the approach can work well if team members are self-motivated, skilled and only require a minimum of coordination and direction. Teams of accountants, lawyers, researchers and technicians, for example, will often respond well to this style.

6. The Coaching Leader
This style of leadership is the least often used of all the styles, possibly because many leaders do not see the personal development of individuals as a high priority. This is a shame, because the dialogue that results from a coaching style makes people feel listened to, aids their understanding of how their work fits the bigger picture, and has a strong impact on motivation. Leaders who coach help individuals to both identify their strengths and weaknesses, and link them to career goals. Coaching leaders are only successful, though, when their team members want to be coached, and welcome the leader’s attempts to help them achieve their best. Coaching is a skill, and as such will not work if it is applied clumsily or inexpertly, or if it is simply imposed on people without their consent.
Activity 4: Influencing Styles Questionnaire

Leaders need to be adaptable in their approach, learning how and when to adjust focus in order to effectively empower others and embrace and facilitate change.

This activity will take approximately 20 minutes to complete and has been designed to explore the importance of influencing styles in Leadership. When you succeed in getting your ideas heard and accepted, you are being influential. People who are influential look and sound confident, well rehearsed and credible e.g. Barack Obama. They are alert to the feelings of others and adapt what they say and how they say it accordingly.

Whether you are truly influential or not will depend on your ability to adapt your approach to suit different people in different situations. As individuals, we all have a ‘usual’ approach to persuade others, sometimes it works better than others.

Using the following ISI (Influence Style Inventory) Questionnaire, you can identify the influencing approach that you feel most comfortable using.

Procedure:

• Please answer this list of questions in terms of what you believe you do in situations where you have a need to influence others.

• Answer each question to describe how you behave in typical day-to-day work situation. Be as objective as you can in describing your behaviour.

• The questionnaire will be of little or no value to you unless you provide an accurate objective description of yourself. If you find you have difficulty making general or overall ratings, focus on situations where it is especially important for you to be influential or where you have some questions about your personal effectiveness (e.g. managing team members, or dealing with clients or customers, etc.).
Influencing Styles Questionnaire - Scoring

For each of the statements listed in the questionnaire, enter on the Scoring Sheet at the end of this questionnaire, the number corresponding to your choice from the five possible responses given below (-2, -1, 0, +1 or +2). The definitions are as follows;

-2 if you DEFINITELY DISAGREE, that is, if the statement definitely does not describe your behaviour.

-1 if you are INCLINED TO DISAGREE, that is, if you are not definite, but think the statement does not tend to describe how you behave.

0 if you are UNCERTAIN WHETHER TO AGREE OR DISAGREE, that is, if you are not sure whether the statement describes your behaviour.

+1 if you are INCLINED TO AGREE, that is, if you are not definite, but think that the statement tends to describe your behaviour.

+2 if you DEFINITELY AGREE, that is, if the statement definitely describes how you behave.

Please note that the item numbers on the scoring sheet progress across the page from left to right, rather than in columns. Please be sure to answer every question.
**Influencing Styles Questionnaire**

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<thead>
<tr>
<th>Statement</th>
<th>Score</th>
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<tbody>
<tr>
<td>1  I put a lot of energy into arguing about what to do</td>
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<td>2  I do not hesitate to point out others’ mistakes</td>
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<td>3  I hand important tasks over to others even when there is a risk of being</td>
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<td>personally criticised if they are not done well</td>
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<td>4  When others become uncertain or discouraged, my enthusiasm carries</td>
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<tr>
<td>them along</td>
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<td>5  I put forward lots of ideas and plans</td>
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<td>6  I am quick to praise another’s performance</td>
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<td>7  I am willing to be influenced by others</td>
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<td>8  I can bring others to see the exciting possibilities of the situation</td>
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<td>9  I put together a good logical argument</td>
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<td>10 I articulate standards which I think others ought to meet</td>
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<td>11 I encourage people to come up with their own solutions to problems</td>
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<td>12 My way of speaking conveys a sense of excitement to others</td>
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<td>13 When opposed, I am quick to come up with a counter-argument</td>
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<td>14 I let people know the standards by which their performance will be judged</td>
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<td>15 I am receptive to the ideas and suggestions of others</td>
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<td>16 When working with others, I communicate my belief in the value and</td>
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<td>importance of the common task</td>
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<td>17 I provide detailed plans as to how the job should be done</td>
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<td>18 I tend to make judgements about what others do or say</td>
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<td>19 I am quick to admit my own mistakes and errors</td>
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<td>20 I articulate an exciting vision of what could be</td>
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<td>21 I suggest alternatives to the proposals which others have made</td>
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<td>22 I pass on to others both praise and criticism which I have heard about</td>
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<td>their work</td>
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<td>23 I sympathise with others when they have difficulties</td>
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<td>24</td>
<td>My enthusiasm is contagious</td>
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<td>25</td>
<td>I push my ideas vigorously</td>
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<td>26</td>
<td>People can readily tell if I disapprove of what they do or say</td>
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<td>27</td>
<td>I listen to and try to use the ideas suggested by others</td>
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<td>28</td>
<td>I am able to put into words the hopes, aspirations and fears which others may feel</td>
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<td>29</td>
<td>It is not unusual for me to stick my neck out with ideas and suggestions</td>
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<td>30</td>
<td>I use the power and authority that I have to get others to comply</td>
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<td>31</td>
<td>If others become angry or upset, I listen with understanding</td>
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<td>32</td>
<td>I am skilful at using images and figures of speech to present exciting possibilities</td>
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<td>33</td>
<td>I put over my ideas clearly</td>
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<td>34</td>
<td>I let people know in advance what is required of them</td>
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<td>35</td>
<td>I readily admit my lack of knowledge and expertise in a situation</td>
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<td>36</td>
<td>I help others become aware of the strengths and advantages they can have by pulling together</td>
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<td>37</td>
<td>I defend my own ideas energetically</td>
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<td>38</td>
<td>I offer bargains or exchange favours to get what I want from others</td>
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<td>39</td>
<td>I put as much effort into developing the ideas of others as I do my own</td>
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<td>40</td>
<td>Am skilful in articulating the aims and goals which people have in common</td>
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<td>41</td>
<td>I anticipate objections to my point of view and am ready with a counter-argument</td>
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<td>42</td>
<td>I give frequent and specific feedback as to whether my requirements are being met</td>
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<td>43</td>
<td>I help others to get a hearing</td>
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<td>44</td>
<td>In persuading others, I appeal to their values, emotions and feelings</td>
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<td>45</td>
<td>I frequently disregard the ideas of others in favour of my own proposals</td>
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<td>46</td>
<td>People always know whether or not they are measuring up to my standards</td>
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<td>47</td>
<td>I listen sympathetically to people who do not share my views</td>
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<td>48</td>
<td>I generate excitement and enthusiasm through my use of colourful language</td>
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<td>49</td>
<td>When other people disagree with my ideas, I do not give up but find another way to persuade them</td>
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<td>50</td>
<td>I make it clear what I am willing to give in return for what I want</td>
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<td>51</td>
<td>I am quite open about my hopes and aspirations, and personal difficulties in achieving them</td>
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<td>I foster an esprit de corps where others feel a sense of purpose</td>
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<td>I am ingenious in producing evidence in support of my own proposals</td>
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<td>I follow up the performance of others to find out whether my standards are being met</td>
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<td>55</td>
<td>I show tolerance and acceptance of others’ feelings</td>
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<td>56</td>
<td>I use emotionally charged language to generate enthusiasm</td>
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<td>57</td>
<td>I talk about my own ideas more than I listen to those of others</td>
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<td>58</td>
<td>I give orders and instructions which I expect to be obeyed</td>
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<td>59</td>
<td>I accept criticism without becoming defensive</td>
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<td>60</td>
<td>I help others to see how they can achieve more by working together</td>
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<td>I present my ideas in an organised way</td>
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<td>62</td>
<td>I check up to see whether others are keeping their side of the bargain</td>
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<td>63</td>
<td>I help others to express themselves</td>
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<td>64</td>
<td>I help others with whom I am working to feel personally involved with and responsible for the success of the project</td>
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<td>65</td>
<td>I draw attention to inconsistencies in the ideas of others</td>
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<td>66</td>
<td>I use rewards and punishment to get other people to do what I want</td>
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<td>67</td>
<td>I go out of my way to show understanding for the needs and wants of others</td>
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<td>68</td>
<td>I strive to develop a sense of unity and common purpose against the outside world in those with whom I work</td>
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<td>69</td>
<td>It is not unusual for me to interrupt others while they are talking</td>
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<td>I judge people on what they do rather than what they say.</td>
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<td>71</td>
<td>I do not pretend to be confident when I feel uncertain</td>
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<td>72</td>
<td>I help people I work with to find common values and aims to strengthen their commitment to one another</td>
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**Influence Style Questionnaire: Scoring Sheet**

**SCORING INSTRUCTIONS:** Add the numbers in each column with a plus sign and enter the sum in to the relevant space. Then add the numbers with a minus sign and again enter this sum into the relevant space. Ignore zeros.

Subtract the smaller total from the larger and enter the result under TOTAL SCORE. Give the sign (+ or -) of the larger subtotal to the TOTAL SCORE.

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<tr>
<th>Persuasive</th>
<th>Asserting</th>
<th>Bridging</th>
<th>Attracting</th>
</tr>
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</table>
Influencing Styles Questionnaire: Descriptions / Characteristics

The definitions/characteristics for the four types of Influencing Style are detailed below:

**Asserting (Reward/Punishment)**

"I produce detailed and comprehensive proposals for dealing with problems. I am persistent in finding and presenting the logic behind my ideal and in marshalling facts, arguments and opinions in support of my position. I am quick to grasp the strengths and weaknesses in an argument and to see and articulate the logical connections between various aspects of a complex situation. I am a vigorous and determined seller of ideas."

**Persuasive**

"I am direct and positive in asserting my own wishes and requirements. I let others know when I am pleased or dissatisfied with their performance. I am willing to use my influence and authority to get others to do what I want. I skilfully use a combination of pressures and incentives to get others to agree with my plans and proposals and I follow up to make sure they carry out agreements and commitments. I readily engage in bargaining and negotiation in order to achieve my objectives, using both tough and conciliatory styles according to the realities of power and position in each situation."

**Bridging (Participation and Trust)**

"I am open and non-defensive, being quick to admit when I do not have an answer or when I have made a mistake. I listen attentively to the ideas and feelings of others, actively communicating my interest in their contributions and my understanding of their points of view. I give credit for other's ideas and accomplishments. I make sure that everyone has a chance to be heard before decisions are taken, even when I do not agree with their position. I show trust in others and I help them to bring out and develop their strengths and abilities."

**Attracting (Common Vision)**

"I appeal to the emotions and ideals of others through the use of forceful and colourful words and images. My enthusiasm is contagious and carries others along with me. I bring others to believe in their ability to accomplish and succeed by working together. I see and communicate my vision of the exciting possibilities in an idea or situation. I get others to see the values, hopes and aspirations which they have in common and I build these common values into a shared sense of group loyalty and commitment."
Having identified your preferred style / approach you may understand why, sometimes, you do not get the desired response or reaction from those who you wish to have the biggest influence.

**Influencing Styles Questionnaire – Interpretation**

**Summary:**

Although it is acknowledged that we all have a preferred style of influencing another, our style may not suit the other party and therefore you may not get the result you are expecting or it may be harder to get to a point of compromise.

Having read about the four potential styles consider the ones which you feel less comfortable operating in and develop methods of incorporating them into your skill repertoire. The more you use them, under the right circumstances, the easier it will become for you to be flexible in your approach and therefore better results may be achieved.

Choosing the right style for the situation is the key. It is okay being flexible but if you continually choose the wrong approach you will not succeed.

**Key Learning Points:**

- We all have a preferred / defaulting style of influencing others
- Always consider the needs of those you are trying to influence before you approach the situation, subtle changes in style can reap great rewards.
There is no shortage of bad business leaders, ranging from the ineffectual to the downright dastardly. But what can be done to make bad leaders better, or even prevent them from becoming bad in the first place? Here we suggest some fundamental things that organisations can do to encourage more effective and ethical leadership.

- **Discourage lengthy tenures**
  Leaders who stay too long in a position tend to lose their edge and slide into bad habits, which can range from complacency to arrogance or even dishonesty. When a leader ceases to be effective, it’s time to make a gentle suggestion that moving on would be in everyone’s best interests, most of all theirs.

- **Share out Power**
  Too much power concentrated in the hands of too few people can be disastrous for organisations. No matter how reluctant a leader is to share his or her power with others, it is vital that good governance measures are put in place to ensure sound decision-making, and to guard against any financial or legal impropriety.

- **Engage with stakeholders**
  History is littered with bad leaders who have served the interest of select groups, with a wilful disregard for the interests, wishes or needs of others. While it is impossible to please all of the people all of the time, engaging and consulting key stakeholders on strategic decisions can help prevent your leader from developing tunnel vision.

- **Encourage a personal support system**
  One of the problems with commanding a lot of power and attracting many followers is that it can be hard for leaders to keep their feet on the ground. Encouraging leaders to develop a support network of advisors, family and friends whose opinions they really value can be extremely useful. These are the people that are able to deliver some unpalatable but important home truths if the leader starts to believe their own hype, or their behaviour becomes in some way unacceptable.

- **Acknowledge that leaders have weaknesses too**
  No leader is brilliant at every aspect of their role. The best leaders tend to be the ones who are willing to acknowledge this fact. A supportive and positive organisational culture will enable leaders to surround themselves with people who complement their strengths, while compensating for their weaker areas.
• **Encourage a healthy work-life balance**

Being a business leader is an extremely demanding role, and one that requires dedication and hard work. But this should not mean that every business leader is a workaholic. In order to perform at the top of their game, good health and a happy home life can have an important part to play in how they think and perform as a leader. Education on the importance of a good work-life balance can therefore, form a useful part of any leadership development programme.

• **Allow time for reflection**

Given the many pressures and demands placed on today’s business leaders, it can be hard to find valuable thinking time. Far from being wasted time, business leaders should be encouraged to take time out periodically to reflect on what has gone well, what has gone wrong, and how they can change their behaviour or use their influence to make things better for the organisation. This is usually most effective when carried out in a quiet place, remote from the organisation itself.
Additional Learning Resources

Short Reads

The Leadership Pocketbook, by Fiona Dent and Phil Hailstone
Written for leaders at all levels - strategic, organisational and team level - "The Leadership Pocketbook" explains how to inspire, influence, deal with change and achieve objectives. Illustrated throughout, the book adopts a practical approach, setting out the principles of leadership, the role of the leader, the skills required for effective leadership and the key challenges facing leaders in the modern business environment. A focus of the book, described by the author as "perhaps the most necessary skill for any leader", is self-awareness - to know yourself, to realise what your leadership strengths and weaknesses are and when you must continue to develop. The Pocketbook Series comprises more than 60 titles in the areas of training, personal development, management, customer care, sales and marketing and finance.

Leadership and the One Minute Manager, by Kenneth H. Blanchard
Adapting one minute manager techniques to enable successful leadership to happen. Using different ways to motivate different kinds of people. Leadership and The One Minute Manager goes straight to the heart of management as it describes the effective, adaptive styles of Situational Leadership. In clear and simple terms it teaches how to become a flexible and successful leader, fitting your style to the needs of the individual and to the situation at hand, and using the One Minute Manager techniques to enhance the motivation of others.

Text Books

Management and Organizational Behaviour, by Paul Hersey, Kenneth H. Blanchard, Dewey E. Johnson
Used by more than a million people throughout the world, this highly readable book provides a comprehensive examination of the applied behavioural sciences, and focuses on fundamental ideas which have stood the test of years of application in academic, business, not-for-profit and administrative environments.

The Handbook of Emotionally Intelligent Leadership: Inspiring Others to Achieve Results, by Daniel A. Feldman
This is a hands-on guide to understanding and applying the 10 skills of emotionally intelligent leadership. The book is written in clear, understandable language and the workings of emotionally intelligent leadership are demonstrated by numerous workplace examples. A 50 question self-assessment that can also be used as a 360 degree assessment allows the reader to evaluate his or her own level of emotionally intelligent leadership. 11 action techniques are taught that can be applied to develop these key leadership skills.

Emotional Intelligence: Why it Can Matter More Than IQ, by Daniel Goleman
There was a time when IQ was considered the leading determinant of success. In this fascinating book, based on brain and behavioural research, Daniel Goleman argues that our IQ-idolising view of intelligence is far too narrow. Instead, Goleman makes the case for "emotional intelligence" being the strongest indicator of human success. He defines emotional intelligence in terms of self-awareness, altruism, personal motivation, empathy and the ability to love and be loved by friends, partners, and
family members. People who possess high emotional intelligence are the people who truly succeed in work as well as play, building flourishing careers and lasting, meaningful relationships.

**Inspiring Leadership: Learning from Great Leaders, by Adair, John**
Who are the great leaders in history and what have they got to teach us today about the nature and practice of leadership? A wide range of inspiring leaders, from Loo Tau and Machiavelli to Thatcher and Mandela. This book is a unique approach to leadership by a writer internationally acknowledged as a major influence on leadership studies. There are key point and Points to Ponder throughout the book, helping to draw out the lessons and concepts for the reader.

**The Inspiring Leader: Unlocking the Secrets of How Extraordinary Leaders Motivate (Hardcover), John H. Zenger, Joseph Folkman, and Scott K. Edinger**
In their bestselling work *The Extraordinary Leader*, performance thought leaders John Zenger and Joseph Folkman revealed the 16 key competencies that separate the top 10% of leaders from the rest. Since that first book's publication, they have discovered, through an extensive study with over 20,000 managers, that leaders who possessed the ability to motivate outperformed all others. *The Inspiring Leader* reveals the authors' newest proprietary research on how top leaders inspire teams to greatness, including the nine behaviours exhibited by the most successful leaders and how to implement them.

**Principle-centered Leadership, by Stephen R. Covey**
A guidebook to personal fulfilment and professional success through "principle-centred leadership" based on timeless principles - showing how goals of excellence and total quality express an innate human need for progress in personal and organizational life.

**The Human Side of Enterprise (Annotated Edition), by Douglas McGregor**
First published in 1960, *The Human Side of Enterprise* has become a worldwide management bible. Douglas McGregor's revolutionary Theory Y--which contends that individuals are self-motivated and self-directed--influenced major management gurus such as Peter Drucker and Warren Bennis. This annotated edition shows how today's leaders successfully incorporated McGregor's methods into modern management styles and practices to nurture leadership ability, create effective management teams, provide better feedback, achieve high performance, and cultivate a value-driven workplace.

**Web Links & Other Resources**

Link to the Peter F. Drucker Foundation for Non-Profit Management site. This is a mine of information and provides other useful links on leadership and management.

[http://www.johnadair.co.uk/](http://www.johnadair.co.uk/)
Link to the John Adair Leadership and Management site. John Adair is one of the world’s leading authorities on leadership and leadership development. This site includes articles on leadership by the author, together with details of his books.

[http://changingminds.org/disciplines/leadership/styles/six_emotional_styles.htm](http://changingminds.org/disciplines/leadership/styles/six_emotional_styles.htm)
A useful link which explores Goleman's work on the link between Emotional Intelligence and Leadership. This website gives an overview of the 6 emotional leadership styles and the effects these have on those you are leading.
Section 5 – Performance Management

Effective Performance Management

Performance Management is a key management responsibility and is the main tool by which you can maximise performance and investment in people. Effective performance management can:

- Attract, retain and motivate high performing individuals
- Measure achievement against business objectives and individual competencies
- Result in staff having greater access to training resources so as to realise and reach their full potential
- Allow managers to evaluate availability to expertise to fill key positions within a team, and support succession planning for the future

Aims of Performance Management

Recognising, valuing and developing individuals’ input will encourage strong performance. The process, when implemented effectively, can be used to address both the needs of the company and the employee.

The main aims of performance management are to:

- Ensure there is a focus on achieving functional goals and priorities
- Develop people to realise and achieve their full potential
- Support personal growth and job satisfaction
- Give clarity on how and what to review staff against

Performance management is an ongoing cycle of activities, not an event which takes place once a year. It involves you as a manager, working with your team to agree on goals and objectives which should be reviewed regularly. It also involves you periodically evaluating and assessing the knowledge, skills and behaviours your team will need to achieve goals, and the actions to develop and stretch areas of knowledge, skill and behaviour further.

Key areas to consider when looking at performance management include, training needs analysis, job requirements, task specific behaviour required for given roles, and gap analysis.
Focus for Section 5

This section of the toolkit looks at ways in which you can work with your teams to optimise performance, by reviewing the key components of performance management. It can also be utilised to examine how you manage your team currently and ways in which this could be improved, along with giving guidance on the all important Personal Development Plan. There is also the opportunity to explore time management and the importance of effective delegation of work.
**Self Directed Learning Activities**

**Activity 1: Team Management**

Effective team management is key to maintaining motivation and direction for all those involved. Focusing on outputs, regular review of work practices, empowering individuals, and playing to people’s strengths are just some of the ways in which leaders are able to get the most out of their workforce.

This individual activity will take approximately 45 minutes to complete and has been designed to help managers and team leaders to evaluate how they currently manage their team, and look at ways in which this could be reviewed and improved. This is done by exploring the characteristics of effective team leaders and reviewing how you, as a manager, compare to these ideals.

**Procedure:**

Review the checklist of statements that are crucial elements of managing and leading a team.

- For each statement, think about how often and how well you do them. Make your own notes in the ‘where am I now’ column.

- Now consider ‘where do I want to be’. Looking at the first one for example, you may want to review the activities of the team more or less often, involve other individuals in that discussion, or want to ask more questions about people’s strengths.

- To help with ‘where do I want to be’, you could take inspiration from how others lead their teams, or from how a previous manager led a team you worked in.

- Finally, for each statement ask yourself ‘what one thing will make the biggest difference’. Note down one thing that you can do that will make a positive step towards where you want to be.

**Further Development:**

Put a note in your diary in one month time to review your progress. What has made a difference for you and the team? What key differences have you made to how you lead the team? What do you need to make these new approaches a normal part of your management practice?
<table>
<thead>
<tr>
<th>Characteristic of Effective Team Leadership</th>
<th>Where am I now?</th>
<th>Where do I want to be?</th>
<th>Action Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>I regularly review the activities and shape of my team ensuring optimum allocation of strengths.</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>I passionately articulate the business objective for our team inspiring buy-in from all.</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>I ensure clarity of individual and team objectives at all times and give positive direction.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I ensure team members are empowered and developed to make decisions at the (lowest) most appropriate level.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I ensure the team’s work is planned and carried out in a structured and systematic way.</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>I spot good performance and provide appropriate feedback &amp; praise.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>When objectives or standards are not met, I give timely &amp; constructive feedback.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Characteristic of Effective Team Leadership</td>
<td>Where am I now?</td>
<td>Where do I want to be?</td>
<td>Action Needed</td>
</tr>
<tr>
<td>--------------------------------------------</td>
<td>----------------</td>
<td>------------------------</td>
<td>---------------</td>
</tr>
<tr>
<td>My team give me honest feedback and I take this on board.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I take time to review the image our team presents considering issues such as our working environment, our appearance, the standards of our work, how we behave and respond to internal and external customers.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am clear about the desired culture, values and behaviours appropriate for my team.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am visible amongst my team, and create opportunities to show that I value all members.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I ensure team meetings are well planned, facilitated and are an effective investment of time.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I ensure all team members are encouraged to innovate and that ideas are listened to.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Activity 2: Guidance on Preparing for a Personal Development Plan

A personal development plan outlines an individual’s development needs and sets out the required actions to help achieve them. The importance of developing a Personal Development Plan is paramount to performance management as it allows individuals to have a personalised set of goals and objectives which they can work towards in a systematic way. It also allows you as a manager to monitor performance against these goals. It is important that an individual’s Personal Development Plan is developed and reviewed regularly with their manager, as this will ensure that the development areas are in-line with the organisations’ objectives and an individual’s own career goals. It is suggested that Personal Development Plans should be reviewed every 3-6 months.

This activity will take approximately 25 minutes to complete and is designed to act as a guide to help managers and team leaders to encourage and aid individuals in putting their Personal Development Plan together. The activity is best utilised as a tool to prepare for a meeting with a staff member who is looking to prepare their Personal Development Plan.

Preparation:

Think about the team member that you are meeting with and ask yourself the following questions:

1. Do you know which part of the job they most enjoy and might want to develop further?
2. Do you know parts of the job they find difficult?
3. Which areas do they feel they need to develop and why?
4. Are they satisfied with the level of support they are given?
5. Do you know what their aspirations are?
6. Do they have any specific development plans, e.g. qualifications, career progression?

Procedure:

Review any questions you could not honestly answer. Think about how you can discuss these questions with them, openly without being intrusive, and be prepared to answer the questions yourself.

It is important to explain why you want to discuss these areas and the impact this will have on them having the opportunity to incorporate what comes from the discussion into their Personal Development Plan.

Use the meeting to discover their real thoughts about their development needs. You could use all the questions above or select a few important ones.
Activity 3: Delegation and Handing Over Responsibility

As a manager, balancing out your own work-load is important to ensure that you have the time to undertake your day to day job related tasks and that of being a good manager and leader, dedicating time and attention to your direct reports. Finding that balance is difficult and the ability to do so will be impacted by a number of things, the main being the perceived work-loads of those around you and their current skill level.

This activity will take approximately 45 minutes in total to complete and is designed as a guide for you to explore how you feel about your current ability and availability to delegate work to your direct reports. It also explores the perceptions of your direct reports and can be used to highlight where differences in perceptions exist. This can be a useful tool to establish if team members are feeling under-stretched or under-challenged, and eager to gain further responsibility to aid their own personal development.

Procedure:

There are two questionnaires associated with this activity, the first is a self-assessment questionnaire which is designed for you to complete on yourself. The second is designed to be passed to one of your direct reports who is able to complete the questionnaire on their views of their work-load and time management.

Once both questionnaires have been complete, review them together, identifying any areas that do not reflect one another. It is important to review statements in particular which are related to each other on both questionnaires, which have been answered in different ways.

Take the time to consider how this can be addressed at the individual’s next one-to-one in terms of their development, and indeed your own as a manager.
Self-assessment Questionnaire - Please spend about 10 minutes completing the questionnaire below by ticking the YES column for the statements that largely apply to you.

Delegation and Time Management Questionnaire: Self-Assessment

<table>
<thead>
<tr>
<th></th>
<th>YES</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>I would delegate more if I had more capable staff around me.</td>
</tr>
<tr>
<td>2</td>
<td>I have to be able to drop things at a moment’s notice and react to problems as and when required.</td>
</tr>
<tr>
<td>3</td>
<td>I don't have much option but to work longer hours than I would like to.</td>
</tr>
<tr>
<td>4</td>
<td>I am not always able to meet deadlines because I have too many conflicting priorities.</td>
</tr>
<tr>
<td>5</td>
<td>People don't seem able to offer their own solutions to problems, which means that more of my time gets wasted.</td>
</tr>
<tr>
<td>6</td>
<td>I have to get involved in too much routine work, which prevents me from getting on with important jobs.</td>
</tr>
<tr>
<td>7</td>
<td>It is difficult for me to plan because my priorities are continually changing.</td>
</tr>
<tr>
<td>8</td>
<td>I have to waste too much time in unnecessary and ineffective meetings which I feel obliged to attend.</td>
</tr>
<tr>
<td>9</td>
<td>Too often I have to get involved in things for which I am overqualified.</td>
</tr>
<tr>
<td>10</td>
<td>I wish I could trust people around me more, but I find they tend to let me down.</td>
</tr>
<tr>
<td>11</td>
<td>Too much of my time is wasted by my boss/colleagues/subordinates.</td>
</tr>
<tr>
<td>12</td>
<td>Because I'm so busy, it is inevitable that my desk tends to get cluttered – but I do generally know where everything is.</td>
</tr>
<tr>
<td>13</td>
<td>I often have to prioritise my work according to who is shouting the loudest.</td>
</tr>
<tr>
<td>14</td>
<td>I have to be reactive in my job.</td>
</tr>
<tr>
<td>15</td>
<td>I think that good time-management principles are fine in theory but very difficult to apply in the real world.</td>
</tr>
</tbody>
</table>

Now total up the number of YES's you have ticked. TOTAL _____
Delegation and Time Management Questionnaire: Direct Report

- Hand the below questionnaire to a member of your team, ideally a direct report. Ask them to spend approximately 10 minutes completing the questionnaire by ticking the YES column for the statements that largely apply to you.

<table>
<thead>
<tr>
<th></th>
<th>YES</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>I am happy with the types of tasks that are delegated to me.</td>
</tr>
<tr>
<td>2</td>
<td>Tasks are delegated to me in a structured way with sufficient time to complete them.</td>
</tr>
<tr>
<td>3</td>
<td>I don’t feel under pressure to work exceptionally long hours.</td>
</tr>
<tr>
<td>4</td>
<td>I am provided with clearly defined priorities.</td>
</tr>
<tr>
<td>5</td>
<td>My boss is extremely good at encouraging me to offer my own solutions to problems.</td>
</tr>
<tr>
<td>6</td>
<td>My boss is extremely creative and is always coming up with new ways of doing things.</td>
</tr>
<tr>
<td>7</td>
<td>My boss encourages me to plan and takes into account my existing priorities when allocating new tasks.</td>
</tr>
<tr>
<td>8</td>
<td>My boss is not continually locked in meetings.</td>
</tr>
<tr>
<td>9</td>
<td>My boss lets us get on with the day-to-day work and only gets involved at appropriate times.</td>
</tr>
<tr>
<td>10</td>
<td>The level of trust my boss has in me is very encouraging.</td>
</tr>
<tr>
<td>11</td>
<td>My boss is very helpful when needed but keeps our contacts effective and to the point.</td>
</tr>
<tr>
<td>12</td>
<td>My boss has a clear desk and looks extremely efficient and organised.</td>
</tr>
<tr>
<td>13</td>
<td>When my boss delegates a task to me he lets me get on with it, but we have regular agreed checkpoints to make sure all is OK.</td>
</tr>
<tr>
<td>14</td>
<td>My boss manages emergency situations well and negotiates realistic deadlines to ensure they can be met.</td>
</tr>
<tr>
<td>15</td>
<td>My boss not only understands the theory of good time management but also puts it into practice every day.</td>
</tr>
</tbody>
</table>

Now total up the number of YES’s you have ticked. TOTAL ______
A key area which is vital to the success of effective performance management is goal setting. It is important to set goals within your team, both on an individual and team level, to ensure that people have something tangible to work towards which will give them a sense of achievement, once they have completed it. It is important that goals set are not purely target driven, and the incorporation of setting goals focused on personal development is key to ensure all-round progression.

Within the field of management, SMART goals are widely used as a way of evaluating the objectives set for individuals. The article below outlines the application of SMART goals and how they can be utilised in performance management.

**SMART Goals**

The idea of setting measurable goals for staff to work to has been around for many years. However the reality of seeing this management practice embedded in many corporate cultures is rare. There are several reasons for this situation:

- The strategic planning process in the organisation is poor or non-existent therefore management find it difficult to quantify what they and their teams should be doing.

- It is easier not to - agreeing goals with staff may mean that, at a future date the manager may be required to take action regarding an individual’s performance.

- As there are variations in models of setting goals, managers become confused as to the key requirements needed to be written in to goals.

SMART is an acronym and clarifying what this means in precise terms will help managers understand the requirements and produce effective goals.

**Specific**

Specific in the context of developing goals means that an observable action, behaviour or achievement is described which is also linked to a rate, number, percentage or frequency. This latter point is critical. To 'Answer the phone quickly' can be said to be a precise description of behaviour, you can clearly see whether someone answers the phone or not, but there is no rate, number, percentage or frequency linked to it.
So, if I state; ‘Answer the phone within 3 rings’ a rate has been added and the behaviour is now much more specific.

**Measurable**
A system, method or procedure has to exist which allows the tracking and recording of the behaviour or action upon which the goal is focussed. Setting a goal that requires phone calls to be answered in three rings is fine, provided a system exists which measures whether this is actually being achieved.

If none exists the manager must be prepared to set aside time to actually monitor the response rates to incoming phone calls. The only other alternative is to get the person with whom the objectives are being set to measure their own progress; in some cases and situations it may be acceptable to do this, in others maybe not - use common sense to decide this.

**Achievable**
The goals that are set with people need to be capable of being reached, put most basically; there is a likelihood of success but that does not mean easy or simple. The goals need to be stretching and agreed by the parties involved. Setting targets that are plainly ridiculous does not motivate people; it merely confirms their opinion of you as an idiot. They will apply no energy or enthusiasm to a task that is futile.

Consider sending a group of footballers out to play a game having told them the final score already, and they've lost! What's the point?

Some people use Agreed for the definition of A in SMART. But as this relates to the process of communicating and deciding the objective rather than a definition of the content it seems out of context in relation to the rest of the criteria. However it is important that goals should indeed be agreed between involved participants rather than enforced.

**Relevant**
This means two things; that the goal or target being set with the individual is something they can actually impact upon or change and secondly it is also important to the organisation. Example: Telling the cleaners that they ‘have to increase market share over the next financial quarter’ is not actually something they can do anything about - it's not relevant to them. However, asking them to reduce expenditure on cleaning materials by £50 over the next three months is entirely relevant to them. It’s what they spend their budget on every day.

As to whether it's relevant to what the organisation is trying to achieve, the manager has to decide this by considering the wider picture.

**Time Based**
Each goal must have a target date for its achievement. For some goals a start date is also necessary and review dates for phased projects are also good practice.
Additional Learning Resources

Short Reads

Performance Management (Briefcase Books Series) by Robert Bacal
The Briefcase Books Series is designed to help managers at all strata of the corporate hierarchy, no matter their training, learn how to become more capable, efficient, and effective. As a part of this series, Performance Management shows managers how to effectively monitor and evaluate employee performance. Written by an expert in the field, this book covers all aspects of performance management, from how to measure an employee's performance to how to reinforce positive behaviour and growth. Domenick shows that the most effective way for managers to monitor performance is to demonstrate to the employee that they are in charge of managing their own performance.

How to Manage Performance: 24 Lessons for Improving Performance (McGraw-Hill Professional Education Series) by Robert Bacal
This book contains 24 Lessons for improving performance dramatically. Increased productivity is the primary driver of growth in today's workplace. But productivity improvements don't occur in a vacuum - they require knowledge, action, and a commitment to performance on the part of frontline supervisors and managers. "How to Manage Performance" provides managers with goal-focused, commonsense techniques to stimulate employee productivity in any environment. This results-based guidebook features 24 invaluable strategies and action steps you can use to communicate the performance you expect from - and the incentives you can offer to - high-performing employees.

The Performance Management Pocketbook (The Manager Series) by Pam Jones
Enhancing the performance of individuals and teams demands the use of a range of skills and techniques in such fields as leadership, delegation, coaching, performance review, communication, objective setting and motivation. This book addresses these areas and more.

Text Books

The 7 Habits of Highly Effective People: Personal Workbook (Covey) by Stephen R. Covey
Dr Stephen Covey is a hugely influential management guru, whose book The Seven Habits Of Highly Effective People, became a blueprint for personal development when it was published in 1990. The Seven Habits are said by some to be easy to understand but not as easy to apply. Don't let the challenge daunt you: The 'Seven Habits' are a remarkable set of inspirational and aspirational standards for anyone who seeks to live a full, purposeful and good life, and are applicable today more than ever, as the business world becomes more attuned to humanist concepts. Covey's values are full of integrity and humanity, and contrast strongly with the process-based ideologies that characterised management thinking in earlier times.

Managing Performance: Performance Management in Action by Michael Armstrong and Angela Baron
With detailed illustrations from the real world, and clear practical advice, this text shows you how to improve the management of your employees' performance. "Managing Performance" will help you: design performance management processes that reflect the context and nature of the organisation; create supportive delivery mechanisms for performance management; and, evaluate and continuously develop performance management strategies to reflect the changing business environment.
Web Links & Other Resources

www.managementhelp.org/perf_mng/perf_mng.htm
This is a free management library website covering a range of topics, for example there is a useful article relating to 'Performance Management During Rapid Change'. You will receive links to other helpful sites available on the web.
Section 6 – Coaching

Coaching is a method of directing, instructing and training a person or group of people, with the aim to achieve some goal or develop specific skills. There are many ways to coach, types of coaching and methods to coaching. Coaching is a highly flexible way to develop personal skills and effectiveness in order to improve performance. Coaching fits with the need for immediate solutions, rapid performance increases, and flexible learning delivery. Coaching is driven by the individual, thereby increasing their commitment to implement learning and improve effectiveness.

Benefits of Coaching to the Organisation, the Individual and the Coach

Some suggested benefits of coaching for the organisation include the recruitment, retention and development of key employees, increased productivity, provision of a stabilising factor when change occurs, bottom-line benefits, help with succession planning and encouragement of knowledge sharing and transfer of skills across the organisation.

For the individual being coached (i.e., the coachee) the benefits include improved individual performance, increased motivation and morale, provision of an unthreatening environment for discussion, encouragement to tackle tasks that they have been avoiding, help with the transition from one level to another, learning for themselves rather than being taught, stress management and the opportunity to develop their personal networks. Coaching also promotes self-reliance, self-confidence and self-awareness.

The more commonly discussed benefits for the coach include greater visibility and respect within his/her organisation, opportunity to practice his/her personal skills and share valuable knowledge/skills and experience, satisfaction in seeing individuals develop, and insight into the needs of the organisation.

Choosing a Suitable Coach

Before choosing a coach, there are a number of things to consider. These are;

- Contrary to belief, the coach need not necessarily be an expert in the individual’s field, and should instead be someone capable of motivating and guiding the individual to further their own personal development.
• From the outset, the individual should be clear about their needs and the results they hope to achieve from the coaching. In order to be able to choose someone to fill the role appropriately, the individual should understand how they want the coach to help them. A face-to-face meeting with the potential coach is probably the most effective way for the individual to communicate their needs and establish whether the coach can meet them.

• Although the individual being coached will need someone to support and encourage them, they will also need someone who can challenge them constructively and help them to reflect on their actions and behaviour in order to obtain truly effective change.

• The individual should feel comfortable that the confidentiality of the discussions will be maintained, and the coach’s code of ethics should be checked.

Focus for Section 6

This section of the toolkit offers an opportunity to explore how to become an excellent coach. It also gives guidance on how to efficiently preparing for a coaching session, and the different preferred styles of coaching. There is also an excellent activity which covers 5 main areas to consider and reflect on when undertaking coaching.
Self Directed Learning Activities

**Activity 1: Becoming an Excellent Coach**

There are key attributes and behaviours that can contribute to becoming an effective coach. Many of these can be learnt and it is important to recognise that individuals at all levels are likely to benefit from coaching of some form. By recognising what makes a good coach, will allow you to develop both your personal coaching style but also allow you to give guidance to others as to how conduct effective coaching sessions.

This activity will take approximately 45 minutes to complete and is designed to help you to understand your personal mental map of the field of coaching. Being able to lead and coach your team effectively is important and can be instrumental in making or breaking a team. Coaching can have a huge impact on the way the team performs and addressing the fundamentals of what makes an excellent coach, is vital to getting it right.

**Procedure:**

1. Think of two people you know who exemplify best practice in relation to coaching. These may be people who have coached you or who have observed coaching others. They should be people who you believe to be extraordinarily helpful in supporting other’s learning. Write their names below.

   Person A ____________________________
   Person B ____________________________

2. Think of two people who demonstrate the opposite of best practice in coaching and write their names below,

   Person C ____________________________
   Person D ____________________________

3. Now compare Person A and B, with Person C. How are Person A and B similar to each other, but different from C? Note down any key values and attributes that come to mind in distinguishing Person A and B, from Person C.

4. Now compare Person A and B, with Person D and repeat the procedure above.
5. Now compare Person A with Person C and D and repeat the procedure above. How are Person C and D similar to each other but different from A?

6. Finally, compare Person B with Person C and D and repeat the above.

7. Once you have gone through this process, list below the key factors which emerged in order of importance. Please note that the list does not have to be in precise order of importance, though some idea of what is most important would be of value.

8. From this list, note in the space provided below what you see as the key contributing factors which make an excellent coach. Alongside each, score yourself on a 1 to 5 scale against each factor (1 = low, 3 = moderate, 5 = high)

<table>
<thead>
<tr>
<th>Key Factor</th>
<th>Score</th>
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Given the above scores, note below what you intend to do to:
- Maximise the use of your major strengths
- Address any weaknesses you see
Activity 2: Coaching Preparation

Being prepared for a coaching session is one of the main factors that will determine how effective and useful the coaching session will be, both for the coachee and the coach.

This worksheet will take approximately 40 minutes to complete and can be used to prepare for a coaching session with a colleague or direct report. When a coaching session has been agreed, it is important to ensure that you are prepared for every eventuality of the conversation, and this activity can help you do so.

Procedure:

- Systematically work through the questions, making notes in the spaces provided.

- It is important to make sure that you work through this exercise at least 24 hours before the coaching session is due to take place. This will allow you enough time to reflect on the points made, and establish if any further information needs to be gathered from other sources.

Coaching Preparation Questions

1. Describe how your colleague / direct report might benefit from coaching. Eg: does a new team member need direction? Is a direct report ready for new responsibility?

2. What is the individual doing effectively?

3. What is the individual doing ineffectively? (if anything?)
4. What impact is the individual’s behaviour having on his or her ability to achieve individual and team objectives (both positive and negative)?

5. What impact is the individual’s behaviour having on other team members (both positive and negative)?

6. What skills do you believe that the employees may want to develop through coaching? (NB, this is still an assumption, this will need to be tested with the individual)

7. In what ways can you contribute to the individual’s development? Ask yourself:
   How might I use my own experience and achievements as a benchmark to measure their progress?
   What skills and behaviours should I be modelling to help them develop?

8. How do you plan to broach the subject of establishing a coaching relationship with the individual? What specifically will you say?

9. How do you plan to establish an atmosphere of trust? What specifically will you say and do?
Activity 3: Push-Pull Coaching Questionnaire

When considering coaching for either yourself or a member of your team, it is important to consider the relationship between the coach and the coachee. It is essential that the coach and coachee are able to develop an effective relationship which will allow openness and honesty from the onset. As some of the things discussed in a coaching session may be of their most personal thoughts, fears and ambitions, it is essential that they feel comfortable talking to the coach. An individual’s natural style of coaching is therefore worth considering before matching up two individuals.

This activity will take approximately 30 minutes to complete. There are many forms of coaching and the appropriate style to use will ultimately depend on the particular needs of the person being coached. However managers and leaders often have preferred coaching style and this questionnaire can be used to gain an indication of whether your natural coaching style is that of a directive or non-directive nature.

Procedure:

- Read each of the following statements carefully and decide the extent to which they describe your behaviour in situations where you need to influence others. Base your answers on typical day to day activities which occur in your job.

- Please ensure that you are as honest as possible. The questionnaire will be of little value unless you provide an accurate and objective description of your behaviour.

- Against each statement, enter in the appropriate box (ie: for questions 1, box A, questions 2, box B, questions 3, box A… etc.) the score which corresponds to your choice from the five possible responses outlined below.

Scoring

<table>
<thead>
<tr>
<th>Score</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>... if you definitely agree; that is, if the statement accurately describes your actions</td>
</tr>
<tr>
<td>3</td>
<td>... if you are inclined to agree; that is, if the statement describes your actions with reasonable accuracy</td>
</tr>
<tr>
<td>2</td>
<td>... if you are undecided; that is, you are genuinely unsure whether or not the statement describes your actions accurately</td>
</tr>
<tr>
<td>1</td>
<td>... if you are inclined to disagree; that is, if you think the statement probably does not describe actions accurately</td>
</tr>
<tr>
<td>0</td>
<td>... if you definitely disagree; that is, if the statement definitely does not describe your actions</td>
</tr>
<tr>
<td></td>
<td></td>
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<tr>
<td>---</td>
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</tr>
<tr>
<td></td>
<td>A</td>
</tr>
<tr>
<td>1</td>
<td>I often delegate important tasks to others when there is a risk that I will be personally criticised if they are not done well.</td>
</tr>
<tr>
<td>2</td>
<td>I put forward lots of ideas and plans.</td>
</tr>
<tr>
<td>3</td>
<td>I am willing to be persuaded by others.</td>
</tr>
<tr>
<td>4</td>
<td>I usually put together good logical arguments.</td>
</tr>
<tr>
<td>5</td>
<td>I encourage people to come up with their own solutions to problems.</td>
</tr>
<tr>
<td>6</td>
<td>When opposed, I am usually quick to come forward with a counter-argument.</td>
</tr>
<tr>
<td>7</td>
<td>I am usually receptive to the ideas and suggestions of others.</td>
</tr>
<tr>
<td>8</td>
<td>I often provide detailed plans to show how a task should be done.</td>
</tr>
<tr>
<td>9</td>
<td>I am quick to admit my own mistakes.</td>
</tr>
<tr>
<td>10</td>
<td>I often suggest alternatives to the proposals which others have made.</td>
</tr>
<tr>
<td>11</td>
<td>I show sympathy towards others when they have difficulties.</td>
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<tr>
<td>12</td>
<td>I push my ideas vigorously.</td>
</tr>
<tr>
<td>13</td>
<td>I listen carefully to the ideas of others and try to put them to use.</td>
</tr>
<tr>
<td>14</td>
<td>It is not unusual for me to stick my neck out with ideas and suggestions.</td>
</tr>
<tr>
<td>15</td>
<td>If others become angry or upset, I try to listen with understanding.</td>
</tr>
<tr>
<td>16</td>
<td>I express my ideas very clearly.</td>
</tr>
<tr>
<td>17</td>
<td>I readily admit my lack of knowledge or expertise in some situations.</td>
</tr>
<tr>
<td>18</td>
<td>I defend my own ideas energetically.</td>
</tr>
<tr>
<td>19</td>
<td>I often put as much effort into developing the ideas of others, as I do my own.</td>
</tr>
<tr>
<td>20</td>
<td>I often anticipate objections to my point of view so as to be ready for an answer.</td>
</tr>
<tr>
<td>21</td>
<td>I often help others to get heard.</td>
</tr>
<tr>
<td>22</td>
<td>I frequently disregard the ideas of others in favour of my own ideas.</td>
</tr>
<tr>
<td>23</td>
<td>I often listen sympathetically to people who do not share my own views.</td>
</tr>
<tr>
<td>24</td>
<td>When other people disagree with my ideas I do not give up, instead I try to find another argument to persuade them.</td>
</tr>
<tr>
<td>25</td>
<td>I am quite open about my hopes, fears and aspirations, and my personal difficulties in achieving them.</td>
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<tr>
<td>26</td>
<td>I am imaginative in producing evidence to support my own proposals.</td>
</tr>
<tr>
<td>27</td>
<td>I usually show tolerance and acceptance of other people’s feelings.</td>
</tr>
<tr>
<td>28</td>
<td>I usually think about my own ideas more than I listen to those of others.</td>
</tr>
<tr>
<td>29</td>
<td>I usually accept criticism without becoming defensive.</td>
</tr>
<tr>
<td>30</td>
<td>I present my ideas in a very organised way.</td>
</tr>
<tr>
<td>31</td>
<td>I often help others to express their views.</td>
</tr>
<tr>
<td>32</td>
<td>I frequently draw attention to inconsistencies in the ideas of others.</td>
</tr>
<tr>
<td>33</td>
<td>I go out of my way to show understanding of the needs and wants of others.</td>
</tr>
<tr>
<td>34</td>
<td>It is not unusual for me to interrupt others while they are talking.</td>
</tr>
<tr>
<td>35</td>
<td>I don’t pretend to be confident when in fact I feel uncertain.</td>
</tr>
<tr>
<td>36</td>
<td>I often put a lot of energy into arguing about what I do.</td>
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</tbody>
</table>

**Totals**

<p>| | |</p>
<table>
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<th></th>
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<tbody>
<tr>
<td>A</td>
<td></td>
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<tr>
<td>B</td>
<td></td>
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</table>
**Interpretation of scores: Push-Pull Coaching Questionnaire**

Box A gives your overall score for the **pull** influence style, this is also known as non-directive coaching. Non-directive coaching focuses on supporting the coachee to examine and self-discover solutions, opportunities and/or pathways to success. Using this approach, a coach can help others to think through their situation and find their own way forward, one which reflects the reality and constraints of their situation.

Box B gives your overall score for the **push** influence style, which is also known as directive coaching. Directive coaching focuses on instructing and giving feedback to the coachee. The focus for this preference is around demonstrating skills, dealing with key performance issues, and advising or recommending solutions to the coachee. Using this approach, a coach is able to enforce authority and a sense of direction. This method has been shown to work best when helping a person to develop their knowledge or acquire a new skill or level of responsibility.

Your overall scored for each style can be interpreted as follows:

<table>
<thead>
<tr>
<th>Score Range</th>
<th>Interpretation</th>
</tr>
</thead>
<tbody>
<tr>
<td>54 - 72</td>
<td>Definite use of the style</td>
</tr>
<tr>
<td>42 - 53</td>
<td>Tendency to use the style</td>
</tr>
<tr>
<td>30 - 41</td>
<td>Neither use not avoid the style</td>
</tr>
<tr>
<td>18 - 29</td>
<td>Tendency to avoid use of the style</td>
</tr>
<tr>
<td>0 - 17</td>
<td>Definite avoidance of the style</td>
</tr>
</tbody>
</table>

There is no definitive answer as to which coaching style is more appropriate to utilise, and it is important to think about other aspects of the coaching situation which may influence the style you chose to use. For example, whether the coaching is being undertaken for performance improvement or development, whether the coaching session is undertaken on a formal basis or circumstantially, and whether a specific or holistic approach is desired. The coachees learning style and indeed the type of issues being explored, will also play their part.
Tips and Techniques

Below are 5 main areas which may be worth considering when undertaking coaching.

1. Listening

Listening skills are vital to the success of effective coaching and there are three main areas to consider. They are;

- Internal listening – the listener focuses on what is being said and interprets what it means to them
- Focused listening – the listener becomes detached from their own thoughts and opinions, focusing instead on the speaker and understanding the speaker's perspective, and looking out for not only what is said, but also what is not said and how it is said
- Global listening – the listener uses all senses and tunes in to the most subtle of signals to pick up on every aspect of the speaker's communication, including emotions, values and motivations.

However, the key to effective listening, is not only in paying attention to all the information that is being received, but also in deciding what to do with this information. The coach creates an impact on the client by steering the discussion appropriately, based on the information that they have received through careful listening.

2. Intuition

As intuition can be vague and rather difficult to explain or verify, it is often regarded as unreliable, and is dismissed and mistrusted by many. However, some believe that it is one of the most powerful gifts a coach brings to coaching.

Coaches are encouraged to think of intuition as an intelligence that can be finely tuned with practice. By trusting it, learning to relax and tune into how it is received (through the senses, for example, or as a 'gut feeling'), and being careful not to attach interpretations to it, the coach can use intuition as an effective tool. The best way of doing this, is by expressing it in the moment as soon as it is received.
3. Curiosity

Good questioning is a fundamental skill of being an effective coach. There is a difference however between questions that merely elicit information, and questions that demonstrate a genuine interest in understanding the coachee and helping them to explore their world.

Unskilled use of questioning can lead to a defensive attitude in clients, especially if they feel that a ‘correct’ answer is sought. This can cause clients to either resist or give the reply that they believe is wanted. Curious questioning, however, breaks down defences, encouraging the client to explore themselves and give an answer from within.

Curiosity demonstrates that the coach doesn’t have all the answers and is genuinely interested in working with the coachee to find them. This helps to build rapport and trust, and is also tremendously flattering and confidence-building for the coachee. In this way, the coach is able to reach deep into the heart of issues with the coachee, making important discoveries that can contribute a great deal to the coachee’s learning.

4. Action/Learning

The mutual support of the coaching partnership creates focus and discipline, helping the coachee to identify and measure their actions and learning. Accountability, explain the authors, does not mean attaching blame or passing judgement, it simply means that the coachee reports on, or gives an account of, their actions in order to create feedback and forward the learning. As the agenda and the results belong to the coachee, the coach puts the coachee in charge and holds them accountable for achieving them.

For the coaching to be successful, it is essential for the coach to set expectations early on in the relationship, ensuring that the coachee understands that they are ultimately in charge, and making it clear that the coach will not force any actions or pass judgement on performance, but will notice and enquire about intended actions that have not been taken.

5. Self-Management

As the coachee is the focal point of the coaching relationship and the key aim is to help the coachee to work on their own self-management, there is no place for the coach to impose their own judgements and opinions. It would, of course, be impossible for anyone to deny the existence of personal thoughts and feelings, but the key, is in being able to recognise when they begin to intrude on the coaching session and put them on hold until after the session.

In this sense, the coach’s well-being is as important as the coachee’s. The coach must prepare themselves emotionally, physically and mentally to help the coachee by ensuring that their own fulfilment, balance and process are in alignment before the session. Setting aside personal distractions, however, does not mean that the coach should avoid being direct or truthful when necessary. Coaching, for both parties, cannot always take place within the ‘comfort zone’. Often, exploring the most difficult or sensitive issues can lead to significant discoveries, and skirting them means that some of the most important learning points for the coachee are therefore lost.
Additional Learning Resources

Short Reads

The Little Book of Coaching: Motivating People to be Winners (The One Minute Manager) (Paperback) by Kenneth H. Blanchard and Don Shula
This is the small book with a big motivational message -- that we can all be winners with the right management techniques. In brief paragraphs and anecdotes, business guru Blanchard and NFL coach Shula offer wisdom on how to help people excel. In business and in work, the motivation should be to be a winner -- this book shows how we can all be winners with the best kind of leadership, and by creating the right kind of environment. The advice for creating the atmosphere for winners is sound and ultimately simple: "Avoid being a 'leave alone and zap' manager and use...praising more,". This book has inspired managers everywhere and is still an essential read

Coaching Questions: A Coach's Guide to Powerful Asking Skills (Paperback) by Tony Stoltzfus
The single most important skill in coaching is asking powerful questions. In this volume, master coach trainer Tony Stoltzfus joins with 12 other professional coaches to present dozens of valuable asking tools, models and exercises, then illustrates these coaching strategies with over 1,000 examples of penetrating questions. Covering the gamut from basic techniques like options and actions to advanced concepts such as challenge and reframing, Coaching Questions is a book that will find a home on any coach's short list of handy references.

Text Books

Are you a good listener? A perceptive observer? Or perhaps you know instinctively when something isn't 'right'? We are all born with some coaching ability and the key to becoming a great coach is knowing what your strengths are and building on these. The Coaching Manual will help you do precisely this. Starting from where you are now, you'll find all the powerful tools, techniques and guidance you need to take you to where you want to be. Both a complete learning experience and an instant source of fresh insight and tips, the manual is your definitive reference throughout your coaching career.

Coaching For Performance: Growing People, Performance and Purpose (Paperback) by Sir John Whitmore
This edition includes additional chapters on incorporating meaning and purpose into work, into goal-setting, and a spiritual approach to coaching, together with a final section on "Coaching the Organisations' Culture". Adopted by many of the world's major corporations, this work also argues for using questions, rather than instructions and commands, and following the GROW sequence - Goals, Reality, Options, Will - to generate prompt action and peak performance. It explores the dynamics of team development and it positions coaching as the essential team leadership skill.

Don't Just Do Something, Sit There!: A Guide to Non-directive Coaching and Mentoring (Paperback) by Bob Thomson
This book offers anyone who would like to learn how to coach or to develop their existing coaching skills a practical guide to coaching people using a predominantly non-directive approach. It considers
the skills which underpin successful coaching - listening attentively, asking questions that help the other to think, and playing back to communicate or check understanding. It explores the spectrum of directive to non-directive coaching, considers practical aspects such as confidentiality, describes a range of tools that a coach might use, and looks at how a line manager can adopt a coaching style. It also considers the philosophical and psychological foundations of non-directive coaching.

Coaching for the Future: How smart companies use coaching and mentoring (Paperback) by Janice Caplan

Increasingly, coaching is seen as the strategic solution for the key business issues - managing the knowledge embedded in the organisation, ensuring the continuous development of that knowledge and managing the knowledge worker. These are critical to competitive success, regardless of whether your organisation is a commercial, not-for-profit or government agency. Janice Caplan has drawn on a wealth of experience to deliver this definitive title, through the use of practical tools and techniques, fully supported by a wealth of case studies from leading organisations in every field, including call centres, television news reporting, the arts world, and a number of public and private sector organisations.

Web Links & Other Resources

http://www.mindtools.com/
This is reportedly the most visited career and management development website. It is an excellent resource, providing a wealth of guidance and tips about how to be more effective at work.

http://hbr.harvardbusiness.org/hbr-answers
Every day, managers face tough problems and challenges. Working with experts, our editors have identified questions and selected Harvard Business Review articles that will get you the answers to those problems.