



## User Guide Introduction

This User's Guide has been produced to provide you with a detailed overview of **20/20 MDS™** series and guidance which will help you to get the most out of the program at all levels of participation.

In its entirety, this program includes thirty subject areas and forty-three individual modules which together provide both experienced and developing managers with a comprehensive support infrastructure of learning materials.

The whole series, at three discreet levels, has been designed so that you will find real benefits from the modules whether you are using them all as a personal development program or in modular format to help you deal with particular aspects of your leadership or managerial role.

## How Does the Learning Participation Process Work?

Eligible individuals nominate themselves or can be nominated by their managers to undertake one or more (successively) of three structured development programs under the 20/20 MDS™:

- (A) Certificate in Team Leadership
- (B) Certificate in Management
- (C) Diploma in Management and Leadership

After going through a thorough self-evaluation process to determine readiness for participating in this program, most individuals would start at level (A) and progress to level (B) and (C) when they have completed previous programs. However, recognition of prior learning is given to individuals to allow them direct entry to level (B) and (C) courses directly where appropriate.

Program participants are given 10 core modules to complete at level (A) (8 core and 2 non-core or electives that can be chosen) and 12 core modules to complete at levels (B) and (C) (10 core and 2 non-core). Individuals attend a one day or half day classroom based program for each course module (4 or 8 hours) and then use module workbooks and a linked web site module to complete work based assignments. This includes on-going development in 20 key management and leadership competencies (that are self-assessed and assessed through 180 degree and/or 360 degree feedback from colleagues as well as assessed by a functional test).

Once individuals have completed each full course/program curricula (elapsed time for which is anywhere between 9 (fast) and 24 months (normal) a final external assessment is made (through the Worldwide Centre for Organizational Development or WCOD (The program managers) and the Institute of Leadership and Management or ILM (the external accrediting body), where appropriate and a certificate is awarded (as a formally recognized, totally portable management qualification).

All of the stand-alone modules have been produced in 'open-learning' format. As you work through each module you will find that the practical management guidance and principles are followed by activities to aid development. They will help you to test your own knowledge and understanding of key management principles and theory and apply that learning within your current or future management roles. Such application of good practice at work will not only benefit yourself, but will also result in many benefits to your team or your part of the HSBC organization.

The guidance which follows should help you to ensure that you approach this series in an efficient and effective way so that this resource will help you, not hinder you, with the challenges of managerial life and personal responsibilities.

All of these subject areas and individual modules aim to develop people's ability in 20 key competency areas of effective leadership and management. On the next page is a summary of the whole 20/20 MDS™ program 30 core subject areas. These subjects and 20 competencies are designed to underpin the HSBC Group capabilities. A chart showing this linkage is included on page 5 of this booklet.

After the linkage to group capabilities on page 6, all 43 individual modules are shown at all 3 levels (including the split between core modules and electives).

# The 20/20 Management Development System™

The 20 Management and Leadership competencies are as follows:

1.	Making Decisions and Weighing Risk	Level C	<i>Management Competencies</i>
2.	Appraising People and Performance	Level C	
3.	Training, Coaching and Delegating	Level B & C	
4.	Thinking Clearly and Analytically	Level B & C	
5.	Counseling and Disciplining	Level B & C	
6.	Setting Goals and Standards	Level B & C	
7.	Getting Unbiased Information	Level A, B & C	
8.	Listening and Organizing	Level A, B & C	
9.	Identifying and Solving Problems	Level A & B	
10.	Planning and Scheduling Work	Level A & B	
11.	Giving Clear Information	Level A	
12.	Managing and Prioritizing Time	Level A	
13.	Contextual Thinking	Level C	<i>Leadership Competencies</i>
14.	Change Orchestration	Level C	
15.	Reciprocal Communication	Level B & C	
16.	People Enablement	Level B & C	
17.	Creative Assimilation	Level A & B	
18.	Driving Persistence	Level A & B	
19.	Emotional Intelligence	Level A	
20.	Directional Clarity	Level A	

**Thirty modules will be available at 3 levels (initially). These module titles are as follows:**

1. Understanding and Managing Yourself*	2. Personal Development*	3. Emotional Intelligence*
4. Effective Communication*	5. Effective Meetings*	6. Presenting to Groups*
7. Working with Others*	8. Coaching & Getting the Best Out of Others*	9. Win/Win Negotiation*
10. Effective Leadership*	11. Developing Teams*	12. Handling Poor Performance*
13. Developing Individual Potential*	14. Managing Change*	15. Creating a Productive Working Environment
16. Creativity & Innovation*	17. Recognizing & Valuing Differences*	18. Selection & Placement*
19. Managing Performance & Projects	20. Problem Solving & Decision-Making*	21. Managing Information & systems
22. Operations Management	23. Continuous Improvement*	24. Managing in Context*
25. Customer Focus*	26. Managing Risk	27. Corporate Strategy
28. Corporate Finance Performance	29. Improving Financial Appraisal	30. Budgeting & Investment

**Key:**

- Managing Self
- Managing Information
- Managing People/Others
- Managing Activities
- Managing Resources

\*Subject specific assessment instruments and profiles applied in these modules



### Linkage to HSBC Group Capabilities

<b>Driving Business Vision and Brand</b>	<ul style="list-style-type: none"> <li>• Visionary thinking</li> <li>• Differentiating HSBC's business and brand</li> <li>• Aligned strategic thinking</li> <li>• Driving change and innovation</li> </ul>	<ul style="list-style-type: none"> <li>• Change orchestration (Level C)</li> <li>• Thinking clearly and analytically (Level B &amp; C)</li> <li>• Directional clarity (Level A)</li> </ul>	<ul style="list-style-type: none"> <li>• Corporate strategy</li> <li>• Managing change</li> <li>• Corporate finance</li> <li>• Improving financial performance</li> </ul>
<b>Commercial Judgement</b>	<ul style="list-style-type: none"> <li>• Entrepreneurial thinking</li> <li>• Judgment and decision-making</li> </ul>	<ul style="list-style-type: none"> <li>• Making decisions and weighing risk (Level C)</li> <li>• Contextual thinking (Level C)</li> </ul>	<ul style="list-style-type: none"> <li>• Operations management</li> <li>• Continuous improvement</li> <li>• Managing risk</li> <li>• Budgeting and investment appraisal</li> <li>• Selection and placement</li> </ul>
<b>Leading Performance</b>	<ul style="list-style-type: none"> <li>• Inspiring trust</li> <li>• driving execution and performance</li> <li>• Inspiring and developing others</li> <li>• Courageous leadership and championing change</li> </ul>	<ul style="list-style-type: none"> <li>• Appraising people and performance (Level C)</li> <li>• Training, coaching and delegating (Level B &amp; C)</li> <li>• Counselling and disciplining (Level B &amp; C)</li> </ul>	<ul style="list-style-type: none"> <li>• Effective leadership</li> <li>• Creating a productive working environment</li> <li>• Managing performance and projects</li> <li>• Coaching and getting the best out of others</li> <li>• Developing individual potential</li> <li>• Handling poor performance</li> </ul>
<b>Customer Drive</b>	<ul style="list-style-type: none"> <li>• Leading a customer driven organisation</li> <li>• Winning new customers</li> </ul>	<ul style="list-style-type: none"> <li>• Identifying and solving problems (Level A &amp; B)</li> <li>• Creative assimilation (Level B &amp; C)</li> </ul>	<ul style="list-style-type: none"> <li>• Customer focus</li> <li>• Managing information and systems</li> <li>• Creativity and innovation</li> <li>• Win/win negotiation</li> <li>• Problem solving and decision-making</li> </ul>
<b>Working With Others</b>	<ul style="list-style-type: none"> <li>• Building relationships and listening to others</li> <li>• Valuing diversity</li> <li>• Influencing others</li> <li>• Managing collectively</li> <li>• Sharing knowledge and fostering open communication</li> </ul>	<ul style="list-style-type: none"> <li>• People enablement (Level C)</li> <li>• Reciprocal communication (Level C)</li> <li>• Getting unbiased information (Level B)</li> <li>• Listening and organising (Level B)</li> <li>• Giving clear information (Level A)</li> </ul>	<ul style="list-style-type: none"> <li>• Working with others</li> <li>• Effective communication</li> <li>• Developing teams</li> <li>• Effective meetings</li> <li>• Presenting to groups</li> <li>• Recognising and valuing differences</li> </ul>
<b>Drive, Commitment and Personal Development</b>	<ul style="list-style-type: none"> <li>• Continual learning</li> <li>• Driving self to achieve collective goals</li> <li>• Adapability</li> </ul>	<ul style="list-style-type: none"> <li>• Setting goals and standards (Level B &amp; C)</li> <li>• Driving persistence (Level A &amp; B)</li> <li>• Emotional intelligence (Level A)</li> <li>• Managing and prioritising time (Level A)</li> </ul>	<ul style="list-style-type: none"> <li>• Understanding and managing yourself</li> <li>• Personal development</li> <li>• Emotional intelligence</li> <li>• Managing in context</li> </ul>

### Module Progression

Course Levels	Core (Mandatory)	Elective (Select 2)
<b>Level C</b> (220 guided learning hours, 96 module hours plus 124 project based and other development hours)	<ol style="list-style-type: none"> <li>1. <i>Managing in Context 2</i></li> <li>2. <i>Corporate Strategy</i></li> <li>3. <i>Corporate Finance</i></li> <li>4. <i>Budgeting and Investment Appraisal</i></li> <li>5. <i>Improving Financial Performance 2</i></li> <li>6. <i>Effective Leadership 3</i></li> <li>7. <i>Effective Communication 3</i></li> <li>8. <i>Managing Change 2</i></li> <li>9. <i>Developing Individual Potential</i></li> <li>10. <i>Managing Performance and Projects</i></li> </ol>	<ol style="list-style-type: none"> <li>1. <i>Managing Risk</i></li> <li>2. <i>Creating a Productive Work Environment</i></li> <li>3. <i>Continuous Improvement</i></li> <li>4. <i>Developing Teams 3</i></li> <li>5. <i>Creativity and Innovation 2</i></li> </ol>
<b>Level B</b> (160 guided learning hours, 80 module hours plus 80 project based and other development hours)	<ol style="list-style-type: none"> <li>1. <i>Managing in Context 1</i></li> <li>2. <i>Effective Leadership 2</i></li> <li>3. <i>Handling Poor Performance 2</i></li> <li>4. <i>Customer Focus</i></li> <li>5. <i>Improving Financial Performance 1</i></li> <li>6. <i>Personal Development 2</i></li> <li>7. <i>Effective Communication 2</i></li> <li>8. <i>Managing Change 1</i></li> <li>9. <i>Creativity and Innovation 1</i></li> <li>10. <i>Coaching and Getting the Best Out of Others 2</i></li> </ol>	<ol style="list-style-type: none"> <li>1. <i>Managing Information and Systems</i></li> <li>2. <i>Operations Management</i></li> <li>3. <i>Selection and Placement</i></li> <li>4. <i>Developing Teams 2</i></li> <li>5. <i>Presenting to Groups</i></li> </ol>
<b>Level A</b> (72 guided learning hours, 60 module hours plus 12 project based and other development hours)	<ol style="list-style-type: none"> <li>1. <i>Effective Leadership 1</i></li> <li>2. <i>Developing Teams 1</i></li> <li>3. <i>Problem Solving and Decision-Making</i></li> <li>4. <i>Handling Poor Performance 1</i></li> <li>5. <i>Understanding and Managing Yourself</i></li> <li>6. <i>Personal Development 1</i></li> <li>7. <i>Effective Communication 1</i></li> <li>8. <i>Coaching and Getting the Best Out of Others 1</i></li> </ol>	<ol style="list-style-type: none"> <li>1. <i>Emotional Intelligence</i></li> <li>2. <i>Win/Win Negotiation</i></li> <li>3. <i>Effective Meetings</i></li> <li>4. <i>Recognizing and Valuing Differences</i></li> <li>5. <i>Working With Others</i></li> </ol>

3-tiered courses: Leadership, Communication, Teams (3)

2-tiered courses: Managing in Context, Personal Development, Change, Creativity, Improving Financial Performance, Coaching and Getting the Best Out of Others, Handling Poor Performance (7)

Managing **Self**, **Information**, **People**, Activities, **Resources**

**Note: Italicized courses are 4 hours, all others are 8 hours**

## Module Titles

As the earlier chart indicated, the 30 subject areas are structured in five sections or clusters to aid development. As you can see from the overview below, this booklet serves as the introduction to the whole series. The 30 subject areas are arranged in five sections which correspond to the 'Key Roles' of management established by the Management Charter Initiative (MCI), the national lead body for management qualifications in the UK (which is used as a base for internationally recognized qualifications).

<b>Introduction</b>	The User's Guide
<b>Manage Self</b>	<ol style="list-style-type: none"> <li>1. Emotional Intelligence</li> <li>2. Understanding and Managing Yourself</li> <li>3. Personal Development</li> </ol>
<b>Manage Information</b>	<ol style="list-style-type: none"> <li>4. Managing Information and Systems</li> <li>5. Effective Communication</li> <li>6. Win-Win Negotiation</li> <li>7. Problem Solving and Decision Making</li> <li>8. Effective Meetings</li> <li>9. Presenting to Groups</li> </ol>
<b>Manage People</b>	<ol style="list-style-type: none"> <li>10. Coaching and Getting the Best Out of Others</li> <li>11. Working with Others</li> <li>12. Selection and Placement</li> <li>13. Recognizing and Valuing Differences</li> <li>14. Developing Individual Potential</li> <li>15. Handling Poor Performance</li> <li>16. Developing Teams</li> </ol>
<b>Manage Activities</b>	<ol style="list-style-type: none"> <li>17. Operation Management</li> <li>18. Continuous Improvement</li> <li>19. Managing Change</li> <li>20. Customer Focus</li> <li>21. Managing Performance and Projects</li> <li>22. Creating a Productive Work Environment</li> <li>23. Creativity and Innovation</li> </ol>
<b>Manage Resources</b>	<ol style="list-style-type: none"> <li>24. Corporate Finance</li> <li>25. Improving Financial Performance</li> <li>26. Budgeting and Investment Appraisal</li> <li>27. Corporate Strategy</li> <li>28. Effective Leadership</li> <li>29. Managing in Context</li> <li>30. Managing Risk</li> </ol>

The objectives for each of these modules have been reproduced for you later in this guide.



### How Can the Learning Material be Used?

The learning material within the 20/20 MDS™ program is 'stand-alone' in that the user is guided through the content with activities and checklists to help him/her to link the learning to performance improvement in the workplace. Research shows, however, that 75% of 'self-study' learners fail to complete programs of study that do not include some form of structured support.

Individuals and client organizations have used the materials in various ways including:

- core materials for each manager going through an in-house organizational management development program with tutorial support built around the modules (some using our high quality printed versions, others using copies from a master set under a license)
- as a reference resource in open-learning centres/libraries
- by individuals keen to develop their own skills and knowledge
- as the basis of distance learning programs and qualifications
- to support N/SVQ programs in management and supervisory areas
- as source material for trainers/consultants to design further/deeper management seminars and training resources.

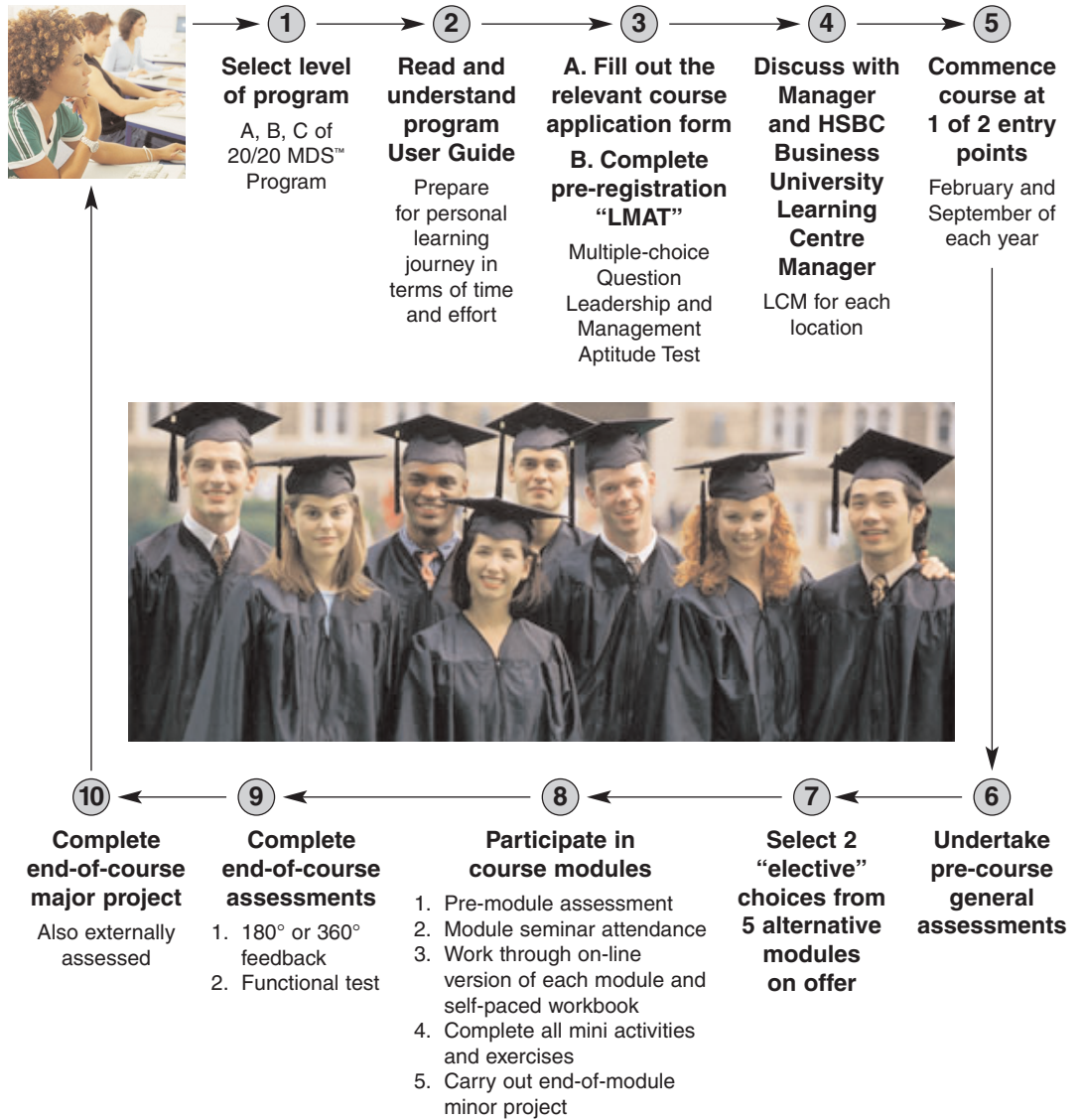
It is important for individuals to note that development of knowledge and skills alone will not result in a Vocational Qualification. You will need to develop a portfolio of evidence of application of such skills at work. The outcomes of the Activities will be extremely valuable for such accreditation, and are indexed to help. You are advised to contact The Worldwide Centre for Organizational Development who are approved to support and award these qualifications if this is your goal.

The process of participating in the full 20/20 MDS™ program at any level has three parts to it as follows:

1. Pre-course self-assessment and personal readiness determination (described in this booklet).
2. Course and individual module participation on an on-going basis (using the hard-copy materials and on-line resources for the program)
3. Submitting project work after each course module and at the end of the entire course at each level of participation (with external assessment)

In total, this entails a series of 10 steps for every individual to undertake. These steps are shown graphically on the following page.

## HSBC Business University Individual Participation Flow-Chart



## Open Learning

### What is it?

In the introduction we referred to conventional studying and open learning studying.

A conventional course is often referred to as a 'closed' course because you have to attend at set times, in a set place. So, in effect, you are not in control of your own learning.

An open learning course puts you, as far as is practical, in control of your learning program. This is achieved by giving you control over several choices.

For example:

- where you study
- when you study
- how much you study
- when you start
- when you finish
- how fast you learn
- how you apply what you learn to your job.

This obviously requires a different approach to studying than a conventional course.

Of course, it would be ridiculous to assume that you can take unlimited time. There must be a structure, a framework, a planned approach.

Open learning, therefore, within practical limits, puts you in charge of your own achievement. You cannot blame anyone else if you fail to achieve what you wanted. At the same time you can take full credit for your own success. You will have the satisfaction of knowing that you planned your own studying and motivated yourself to achieve your goals.

Because you are in control you can decide the pace at which you learn and if you are not sure that you have fully understood a particular topic you can spend as much time as you need on it until you are sure you can move on.

You can choose the time of day when you will study. Some people are more active early in the morning, while others prefer evening. Study times can also be arranged around family or outside commitments.

The place where you will study is also under your control; at home, at work or wherever is convenient.

### What are the Problems?

Being more in control of your learning, you will come across certain common problems which all open learners face. These are:

- finding time to study
- motivating yourself to study
- interruptions from family or friends
- maintaining interest and attention
- feeling uncertain about your commitment to finish the entire course level
- understanding particular topics
- remembering what you have learned
- a feeling of being isolated with no one to ask advice from.

Some or all these problems will affect you at different times as you study. How successful you are at overcoming them will largely depend upon how committed you are to learning the techniques which will enable you to effectively manage your organization and benefit everyone in it, as well as your clients.

So how do you overcome them? Here are some ideas.

## Planning your Time

### Shortage of Time

When young people study at school, college and even university, they usually have three enormous advantages:

- they are studying full-time
- they rarely have any responsibilities or commitments
- their study time in the class is planned for them.

You, on the other hand, as a mature person, may have a number of constraints on you:

- you can only afford to study part-time
- you may have a full-time job and other responsibilities
- you may not be used to organizing your own studies.

The net result of this can be a severe shortage of spare time in which to study.

It is for this reason that you should confront this problem head-on before undertaking this program. It is no use thinking that you can study on a casual basis where work is just completed occasionally when there happens to be free time.

Systematic progress requires a regular and disciplined attitude to study in which a great deal of work gets done. All this will require a considerable amount of well spent time. But where will this time come from? How can you combine studying with a normal life which includes work and family commitments?

### What you can do

The answers to these (very common) problems fall into three categories:

1. You should be prepared to create more free time by rearranging and maybe sacrificing some of your other activities.
2. You should make more efficient use of your existing spare time by careful planning and a disciplined use of it.
3. You should try to integrate study activity with other parts of your life where possible.

We will look at each of these categories in turn to see how the problem can be tackled at a particular level, but first a word of encouragement. Many mature people think that they work at a disadvantage compared with younger people, but in terms of organization and discipline regarding their time they are often far more experienced. Anyone who has had to accept the disciplines of regular time-keeping at work or who has organized the routines of family life or childcare knows what it means to establish priorities, meet deadlines, and stick to plans.

What may come as a novelty to you is turning such discipline, restraint and planning into the development of your own life. But it can be done. Let's see how.

### Creating More Free Time

Here is an average day in the life of Sam. How do you think she could create more time for herself in which to study? (It is usually easier to solve this problem for others than for ourselves). You should also try to take into account what possible effects making a change might have.

Remember, your objective is to find or 'create' spaces in the day which could be used for studying. At this stage, look for larger blocks of time – say around an hour – but later we will show you how even smaller units or just the odd few minutes can be put to good use. You will probably have to look for spots of 'dead time' (in which nothing special is being done) or switch more activities around to create spaces.

#### Sam (single woman)

<b>08.00 am</b>	Gets up – breakfast
<b>08.30 am</b>	Travels to work on the bus
<b>09.30 am</b>	Works in the Customer Call Centre
<b>12.30 pm</b>	Lunches in the staff canteen
<b>01.30 pm</b>	Works
<b>05.30 pm</b>	Travels home
<b>06.30 pm</b>	Evening meal
<b>08.00 pm</b>	Plays badminton
<b>10.00 pm</b>	Out with friends
<b>11.00 pm</b>	Reads the paper in bed
<b>11.30 pm</b>	Falls asleep

Sam has the disadvantage (from the study point of view) of having to spend seven hours of her typical day at work; time which we assume she cannot use for study. The rest of her day present a number of possibilities:

- **'Travels to work on the bus'**. Two hours (total) time is available every day traveling to and from work. This is time which might be spent looking out of the bus window, but which could be used for reading or looking over notes instead. Obviously nothing very strenuous or demanding can be done under such conditions, but the time is lost otherwise. Many people spend such time reading newspapers; why not a module instead?
- **'Lunches in the staff canteen'**. Many people could put this hour to good use by having sandwiches for lunch and spending the time on a little reading. Again, nothing very extensive need necessarily be undertaken, but keeping in touch with the subject will be beneficial and perhaps even a refreshing break from work. Sam would be sacrificing the company of colleagues for the hour, but this is a case of deciding priorities. Which is the more useful to her: a chat with workmates, or time spent in study on, say two or three of her five weekdays.

- **‘Plays badminton’**. Physical fitness can help promote mental fitness, but does she have to play in the middle of the evening? If she could play either earlier or later she might free a couple of extra hours for study. This is an example where studying comes into conflict with social life, and it might require understanding on the part of her friends and the disruption of her normal routine.
- **‘Reads the paper in bed’**. Not everybody can study efficiently later at night, and this is obviously a suitable time and place for relaxation, but look how long Sam spends in bed; nine hours in all! She could possibly make do with less time there, either getting up earlier in the morning or rearranging her evening [see (c) above] and going to bed later. Both of these strategies could lead to an extra two to three hours of free time.

Some people may look at Sam’s schedule and dream of such a relaxed self-focused day. You may, on the other hand, know individuals with far more external demands on their time who still find time to study. The busier, more effective individuals have argued that ‘capacity to do extra is a state of mind’ not a statement of the ‘hours in the day’.



## Activity

Pick a typical day in your life and list your activities in the way we have done for Sam. The important thing here is that you should be as honest and accurate as possible. Don't cheat by picking your busiest day, and be prepared to admit to those periods which are spent 'pottering' or 'relaxing'.

This is a timetable for a whole week. Just as a preliminary exercise you might like to shade in with a pencil those periods which at the moment are definitely spoken for by family or work commitments. Leave all the rest blank.

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
7am							
8							
9							
10							
11							
12							
1pm							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							

Where are the largest blank spaces? For most people the evenings and the weekends will leave most time free. But even so, you may have shaded in periods which, at the moment, you feel are spoken for which with a little more self-sacrifice and discipline could be made free for time in which to study.



## Making More Efficient Use of Existing Time

Like many other techniques of study, this is largely a question of bringing sound common sense to studying, and then having the self-discipline to apply the results. Efficiency in your use of time can generally be improved by:

- planning what you do
- creating the right conditions for study
- pacing yourself
- being an 'active' student.

Let's consider each of these in turn.

### Planning

We have already mentioned the idea of a weekly timetable which will show you the periods you have free for study. This planning can be extended to what you study. For example, regular periods of time set aside in which you decide in advance what to do will make you more aware of what you are doing.

### Creating the Right Conditions for Study

Not every person can create the ideal conditions for the most effective use of study time, but it is a great help if you know what these conditions are. Some will seem obvious, others less so. Let's start with the most important.



Make a list of those physical conditions you will need around you in order to study most efficiently and produce your best work. (Remember that for most topics this will mean a great deal of reading and writing).

Your answers may vary, but they should include the following important conditions:

- Isolation
- No distractions or interruptions
- Comfort
- Study materials to hand.

Each of these warrant further explanation.

## Isolation

This may seem Utopian to those people living amongst large, busy families – and you may need the help and co-operation of other family members to create it – but you will work more efficiently when you are on your own. This may mean working in a ‘spare room’, a room not currently in use (say, a bedroom during the daytime), getting up in the morning before others, or waiting until they have gone to bed. Other possibilities exist however. If it is convenient, you could work in your local library; many have an area or a room set aside for reference or research.

The ideal would be to have your own study, but this is not possible for everybody. It is important to remember, however, that you will not be able to work efficiently if you are surrounded by other people.

## No Distraction or Interruptions

The most common example of this is the person whose attention is repeatedly distracted by children. Many people, for this reason, wait until their children are in bed before they take up serious study. But distractions exist in other forms: working near a television set, a ringing telephone, or even near the front door of a busy household will interrupt your concentration and prevent you from working efficiently. Each time your concentration is broken you will find it necessary to take a ‘step back’ to regain your momentum.

Some people find it relaxing to have the radio playing quietly in the background whilst they work. If you do, make sure it is music and not the spoken word. If friends insist upon telephoning you, keep the conversations short; if necessary, take the phone off the hook. If friends call when you are studying you needn’t be rude to them and turn them away, but you can explain your concern to study for a decent period and perhaps usher them away after a quick cup of tea and a chat. After a while, family and friends will come to terms with your study needs and, if they are good friends and an understanding family, come to respect them.

Cutting yourself off from contact with other people is one way of avoiding interruptions and distractions, but there exists another major source of them: *oneself*. It is all too easy, especially when engaged in a difficult or boring task, to make *another* cup of coffee, drift into daydreams, read the newspaper, go for a walk, or find some task which seems so much more interesting. *Anything* seems more interesting, on occasions, than embarking on study. Guard against this. Split your study periods into small units if necessary, but **stick to them**, and **avoid distracting yourself**.

## Comfort

Don’t try working in a cramped corner in some freezing cold attic room, or any conditions which put you under physical strain. But BEWARE! Too much ‘comfort’ can be just as dangerous. Working in rooms which are over-heated, or reading sprawled out on a settee or bed, will almost inevitably make you feel very drowsy. A chair drawn up to a desk or table is the basic condition here which has well served thousands of learners over many generations.

## Study Materials

It should be obvious that you will study more efficiently if all the materials you require are close at hand. Since these are most likely to be books, papers and pens, the desk or table top is a convenient place to put them. You will not work well if you need to keep going in search of a pencil, the book you need, or your notes on a particular topic. Either keep all the materials you need closer together in the room where you work, or take them all to it when you do.

Now for some 'conditions' which may not seem obvious.

## Lighting

Don't read or write in gloomy conditions. This will cause eye-strain, headaches and drowsiness. Have a good source of light directed onto the page.

## Pacing Yourself

This idea of increasing your efficiency by pacing your efforts can be broken down into two sub-categories:

- **Arranging your time in manageable units.** Most people's concentration begins to flag after a while, so even if you have a long period for studies available to you don't work non-stop. Two separate study periods of two hours each would probably be more profitable than just one of four hours continuous work. Even those two hours could be broken up into two sessions with a short break in between. There is nothing wrong with this, provided the break isn't prolonged until it has eaten up most of your second session!

So parcel your time into discrete, manageable units. Organize short breaks for a drink, a change of scene, or just a breath of fresh air. This will keep you mentally fresh; you can look forward to the next break as a 'reward', and you can deal with your study tasks in stages.

- **Working at a time and speed which suits you best.** Some people work better in the morning, some later at night. Try to recognize which is best for you and which fits in best with your other commitments. If you feel you're freshest in the early morning for instance, it might be possible to get up an hour or two earlier than usual and take advantage of the relative peace and quiet before other people get up or you have to go to work.

Similarly, provided you don't feel too tired, it might be possible to work late at night when other people have gone to bed.

If you have the capacity to do a lot of work at one sitting you might organize your time in a series of large blocks. On the other hand, if you find you can only concentrate for short periods you will do better to arrange a regular and more frequent series of study sessions in order to get the best out of yourself.

The key is this: recognize how and at what pace you work best, and then organize your periods of study to suit.

## **Combining Study with Other Activities**

We have already come across the example of Sam who had two hours available to her if she was prepared to combine study with traveling to and from work on the bus. It should be obvious that the same opportunity exists for those traveling by train or as a passenger in someone else's car.

If you think about it carefully and are prepared to change your normal patterns of behavior you will realize that many routine tasks can be performed without intense concentration and can therefore be combined with some form of activity. And remember that studying can include thinking, as well as the more active reading and writing. For instance:

### **Housework**

Most forms of housework or do-it-yourself tasks can be done while you mentally rehearse the main outlines of a topic you are studying. It may also be possible to have some notes nearby and to check your memory of them when you are working. All these activities will be good for mental discipline as well as for their own sakes. The same activity could take place when you are gardening or washing the car. Just try to get used to the idea that whilst your hands are occupied with one thing, your brain can be busy with something else.

### **Leisure Time**

Many people claim that they can read or write while watching television, and given the shortage of space in many people's homes, it may be necessary to study in a room where there is a set. We would strongly advise you against trying to do this. It is almost impossible to concentrate properly on anything serious or complex when subject to the distraction of both sound and vision. If other people are watching television when you wish to study you are advised to go into another room to do so.

## Motivating Yourself

### Setting Targets

As we said at the start, open learning is not an easy option. You will have to work hard if you want to get off to the best possible start. It is very easy to fall by the wayside when you don't have someone making sure you study. If you can motivate yourself to studying by this method it will be really worthwhile. Once you start applying the management techniques you will have to motivate yourself to get jobs done.

Set yourself a realistic target for each of your study sessions.

For example: *'I'll read pages 8 to 26 tonight'* or *'I'll complete this section by Friday'*.

This way you will be more likely to achieve what you set out to do. If you don't achieve your target find out why.

- Are you trying to read too much at one go?
- Are you getting frequent interruptions?
- Are you not understanding the material?

You can then do something about it.

If you have achieved what you set out to do, then give yourself a pat on the back. You've earned it!

### Talking with Colleagues

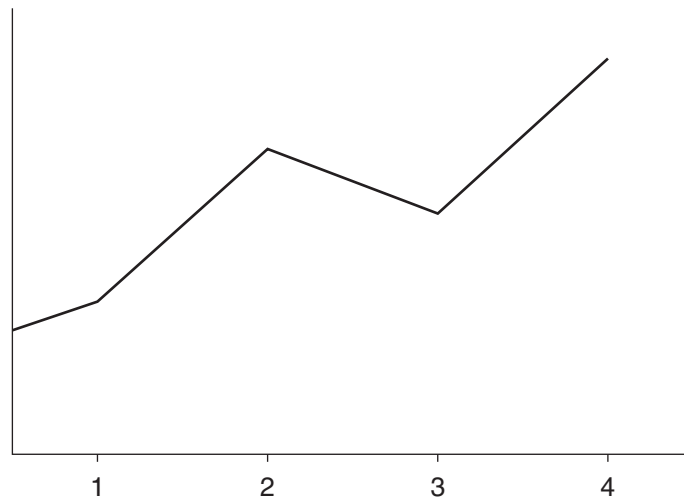
Help from colleagues can be quite crucial with this form of study. Talk to them and you will probably find that they face the same problem of motivation as yourself. Don't study in isolation.

One of the biggest drawbacks in studying by open learning is the feeling of isolation and loneliness. If you discuss the topics with others in your organization, you can motivate each other and help each other. It is surprising how keenness rubs off onto other people when in a group.

No-one is going to be behind you to push you to study. What you learn is under your control. You cannot blame others if you spend all your planned study time doing other jobs and end up not achieving your targets.

## Learning Stages

Most open learners go through four stages of learning. If a graph was drawn it would look like the one below:



Let's look at what happens at each of the four points.

- **Point 1.** The material, subjects and way of studying are all new to you. So, you don't seem to make a lot of progress.
- **Point 2.** You are now getting used to the material, subjects and way of studying. You are able to understand things more quickly and you begin to make a lot of progress.
- **Point 3.** The danger point! You'll reach a stage during the programme when things don't go right. You can't seem to make any progress or you find out a piece of information. This is when you need to stick at it and don't give in.
- **Point 4.** If you've stuck at it you'll start to learn new topics again and make progress.

## Understanding and Remembering the Material

Linking what you are reading with your everyday environment will help you understand topics, but how do you then remember what you have learned?

- Well, firstly, never try to memorize what you don't understand. Learning something 'parrot fashion' will not do you any good at all when you start to apply the techniques. You need to be able to remember what you have learned. Let's look at what you can do.
- Make notes as you read, even if they are only brief. You can then go over these at the start and end of a study session.
- Make sure you fully understand each topic before you read on. It's very tempting to leave a particular topic and mean to come back to it later.
- Don't try to read too much at one go. If there is a long chapter, read small sections at a time.
- When you are reading the material you will come across Activities which ask you to do something. These are followed sometimes by Checklists to show you what you might have considered. It is very tempting to 'cheat' and look at the checklists before trying the activities. By trying the activities first and then comparing your information with the checklist you will remember things better.
- Some activities may take only a few moments' thought; some may take rather longer, particularly if they involve collecting information. These activities are an important aspect of the program, especially if you are pursuing a competence based qualification, and you should tackle all of them.

Now that we have looked at what you need to carefully consider before you commence your learning journey, the second part to this User's Guide provides you with an overview to all the 30 modules in the series. Each page provides an introduction to the subject, the overall subject learning objectives, the underpinning competencies, and finally, any subject-specific assessments that are used to aid pre-learning understanding and appreciation.

## Module Description and Objectives

### 1. Understanding and Managing Yourself (Level A)

This module has two parts. The first part explores the whole area of personal style and temperament and suggest that we can be more effective by recognizing that people can think and act in ways that are often quite different to our own.

The second part of this module looks at the whole area of personal time management. Some experts suggest that many managers escape from the pressures of job induced anxiety by adopting a number of unproductive mechanisms that they call 'busyness'. They escape into time consuming activities that they find less threatening, though much less productive, than the tough aspects of their jobs. Of course, once this time has passed you cannot get it back; time is one of the aspects of our lives that many of us value only once it has slipped away.

If you adopt the techniques described in this module and to better understanding yourself and others and organizing your time as suggested, you will find that you are getting more done in a calmer and more efficient manner.

#### Objectives

At the end of this module you will be able to:

- Understand your own style and temperament (in comparison to others)
- Learn to 'flex' your style when this would be beneficial
- analyze how effectively you use your time at the moment
- describe strategies for using time more productively
- plan how you will improve your use of time
- assess your vulnerability to stress and plan how to look after yourself more effectively.

#### Underpinning Competencies

Directional Clarity  
Setting Goals and Standards  
Managing and Prioritizing Time  
Managing and Scheduling work

#### Linked Assessments (where applicable)

Psychological Type Indicator  
Time Management Effectiveness Profile  
Stress/Pressure Management Effectiveness Profile



## 2. Working with Others (Level A)

This module is designed to help you to review and develop your relationships with the people with which you work, whether these are members of your team, more senior managers or other colleagues. You will be looking at the interpersonal skills which can help to promote good communication and more productive working relationships.

The first two sections of the module focus on some techniques for establishing constructive relationships with other people, including assertiveness and communication skills. It then explores how effective feedback can help you to create a healthy climate of communication. This can help individuals to learn about themselves, the effect their behavior has on other people and how others perceive them. The final three sections examine some of the approaches that you may want to use if you have to deal with poor performance, conflict or other problems. You will therefore be looking at counseling skills, implementing grievance and disciplinary procedures and making positive use of conflict.

### Objectives

At the end of this module you will be able to:

- establish constructive relationships with others
- develop relationships of trust with colleagues and team members by informing and consulting them about problems and proposals
- provide praise and constructive feedback to others in order to improve performance
- offer appropriate counseling to staff
- implement a grievance or disciplinary procedure
- manage conflict creatively.

### Underpinning Competencies

Listening and Organizing  
Getting Unbiased Information  
Giving Clear Information

### Linked Assessments (where applicable)

Conflict Style Profile

### 3. Problem Solving and Decision Making (Level A)

As a manager you constantly have to solve a variety of problems and make many different kinds of decisions. It is one of the key distinctions between managers and non-managers. Some are major problems or decisions, with a fundamental impact on the organization, while others are about the day-to-day matters that are part of working life.

In this module you will explore the different approaches you can take when looking to either solve problems or make decisions so that you are confident that you are taking the best approach decision in any given set of circumstances.

#### Objectives

At the end of this module you will be able to:

- describe the differences and the relationship between the problem solving and the decision making processes
- identify and define problems in the context of your objectives
- identify the stages in the process
- structure information to aid decision making and problem solving
- describe the differences between convergent and divergent thinking, and their application through a range of techniques
- apply appropriate techniques at each stage.

#### Underpinning Competencies

Identifying and Solving Problems  
Creative Assimilation  
Getting Unbiased Information

#### Linked Assessments (where applicable)

Problem Solving Effectiveness Profile

## 4. Recognizing and Valuing Differences (Level A)

### *Elective*

This module has been designed to help managers working in all types of organizations to reflect on their knowledge and practical skills in the area of equal opportunities. The module aims to help you to give meaning to effective equal opportunities policies and will act as a background for the discussion of equal opportunities issues. It will also help you to explore the benefits of interacting with people without bias and insensitivity.

It is designed to support you to approach equal opportunities from a view of treating people with dignity and allowing everyone to be able to perform to their level of ability.

### **Objectives**

At the end of this module you will be able to:

- assess how effectively you promote equal opportunities at the moment
- explain equal opportunities legislation and its implications to you as a manager
- apply and encourage anti-discriminatory behavior
- use appropriate language in promoting equality of opportunity
- plan how to make recruitment decisions without discrimination.

### **Underpinning Competencies**

Getting Unbiased information  
Listening and Organizing  
Reciprocal Communication  
Emotional Intelligence

### **Linked Assessments (where applicable)**

Diversity and Cultural Awareness Profile

## 5. Win-Win Negotiation (Level A)

### *Elective*

The dictionary defines negotiation as ‘Conferring with another with a view to compromise’ or ‘The bringing about of a desired objective’. It sounds simple enough and yet we know that negotiation seems sometimes to be a protracted affair, with those doing the negotiation around the world appearing, at times, to be immovable objects.

As a manager you will engage in some form of negotiation every day, yet this topic does not feature in most management programs. Other modules will deal with customer relationships and communication skills.

This module has been produced to arm you with the skills to negotiate for ‘Win-Win’ outcomes in many different situations that as a manager you will encounter every single day.

### **Objectives**

At the end of this module you will be able to:

- recognize your normal negotiating style and apply remedial action to improve it if appropriate
- recognize the importance of preparation when negotiating
- understand the customer’s objectives and deal with perceived competitors’ threats
- calculate your negotiating options
- conduct a SWOT analysis of your negotiation position
- recognize the difference between assertive, aggressive, and passive behavior in yourself and others
- aim for win-win and be a better negotiator.

### **Underpinning Competencies**

Directional Clarity  
Giving Clear Information  
Getting Unbiased Information  
Listening and Organizing

### **Linked Assessments (where applicable)**

Negotiating Style Profile

## 6. Emotional Intelligence (Level A)

### *Elective*

Although there is some dispute about what constitutes human intelligence or human emotion (and how it might be successfully measured) this module suggests that the term emotional intelligence draws on two simple concepts. To be 'intelligent' or what we will term "applying knowledge appropriately" and to be 'emotionally astute' or 'tuned in', or what we will term "applying feelings appropriately". Emotional intelligence is driven by two major factors. These are people's basic drive or motivation and the relative structure or flexibility of their thinking about themselves and others. It is therefore suggested that 'applying knowledge appropriately' is fundamentally about 'analysis' and 'intuition', and 'applying feelings appropriately' is fundamentally about 'experience' and 'expression'.

Grounded in the work of modern day psychology and neuro-science, this workshop will introduce four emotional intelligence styles that people are likely to adopt in varying degrees in dealing with life in general and other people in particular. By learning what contribution each of these style types makes, we can start to recognize that style versatility is likely to lead to the most beneficial outcome in most cases.

### **Objectives**

At the end of this module you will be able to:

- Identify the four stages of U-UNDERSTAND, L-LEARN, A-ASSESS and R-REVIEW of the effective emotional intelligence continuous learning cycle.
- Identify and interpret the significant emotions of yourself and others.
- Recognize the difference between emotional traits and states and their impact on people's behavior and action.
- Appropriately select and apply all four emotional intelligence styles.
- Enhance your ability to effectively manage and better control emotions in a range of different situations.
- Demonstrate how a more 'rounded' use of emotional intelligence can improve competency in a range of specific areas.

### **Underpinning Competencies**

Emotional Intelligence

### **Linked Assessments (where applicable)**

Emotional Intelligence Style Profile

## 7. Effective Meetings (Level A)

### *Elective*

In any review that asks managers to list the major time-wasters in their working day, meetings virtually always come towards the top of the list. When a few more questions are asked to find out why this is, responses come back that most meetings are unnecessary, boring, achieve very little if anything and are 'talking shops'.

Two pieces of research show the scale of the question. One indicates that managers spend up to 60% of their time in meetings of one sort or another and if you work out the financial cost of the salaries alone, you get an idea of the importance of making them effective. The other, carried out amongst several hundred senior managers, indicates that over 70% of respondents claim that many meetings are a waste of time, with over 75% attributing this to a lack of training on how to get the most from them.

A few meetings, though, are admitted to be worthwhile. They are helpful, seem to run on time, have an atmosphere of constructive communication and they seem to achieve something. This module looks at why this is. It starts here with the simple notion that meetings are made up of people. Meetings have no life of their own and so if they work or they don't work it has to be the people that are the deciding factor.

### **Objectives**

At the end of this module you will be able to:

- describe the characteristics of effective meetings
- identify the key contributory factors in setting up and preparing for meetings
- describe the key contributory factors in managing meetings so that they fulfill their purpose
- specify the role of an effective chairperson or leader at different types of meeting
- take appropriate action at the end of meetings to ensure that decisions are clarified and implemented.

### **Underpinning Competencies**

Directional Clarity  
Giving Clear information  
Planning and Scheduling Work

### **Linked Assessments (where applicable)**

Meeting Effectiveness Inventory

## 8. Personal Development (Levels A & B)

Continuous professional development (CPD) is becoming more widespread in the last 10 years than at any time in the last 50, and will continue to do so in the new millennium thanks to a number of related movements:

- The growing support for attempts to create 'learning organizations', reflected in initiatives such as Investors in People
- The decision of the majority of professional bodies which requires evidence of continuous professional development before members are upgraded
- New Vocational Qualification systems which require people to produce evidence of their competence at work
- The growth of new technology which makes self directed learning more feasible. Compact disk technology has increased the opportunities already offered by computer, video and text based self-study packages.

All this means that it has become particularly important that managers be concerned about self development. This module guides you through a process of identifying needs, planning, implementing, reviewing and evaluating your personal development.

### Objectives

At the end of this module you will be able to:

- understand your own behavioral temperament and style
- assess your development needs in the light of your personal aspirations, organizational goals and external requirements
- devise a personal development plan to develop yourself to improve your performance
- continuously develop your own knowledge and skills in line with your goals and objectives
- monitor the implementation of your action plan and evaluate the outcomes.

### Underpinning Competencies

Directional Clarity  
Emotional Intelligence  
Setting Goals and Standards  
Identifying and Solving Problems

### Linked Assessments (where applicable)

Learning Styles Profile  
Goal Setting Effectiveness Profile

## 9. Handling Poor Performance (Levels A & B)

It would be an ideal world (and a naive expectation of managers) to have all employees arrive at work on time every day, with a positive attitude, a strong willingness to work, and a commitment to earn their keep.

Unfortunately, in the real world, there are always employees (even if they are in the minority) who are undisciplined, incompetent or committed to getting the most and giving the least. This happens despite our best efforts in selecting and training employees.

Hence, it is sometimes necessary for a manager to intervene when performance standards have not been met. This module deals with how to counsel and (wherever necessary) discipline employees in a positive, constructive manner.

### Objectives

At the end of this module you will be able to:

- recognize your strengths and weaknesses relating to counseling and disciplining others
- apply transactional analysis as a way of understanding and influencing communications
- apply questioning and listening skills to handle poor performance positively
- manage conflict and angry people
- communicate assertively
- describe the main issues and risks when initiating disciplinary and dismissal procedures.
- Apply formal disciplinary processes reasonably and fairly

### Underpinning Competencies

Directional Clarity  
Giving Clear Information  
Getting Unbiased Information  
Counseling and Disciplining

### Linked Assessments (where applicable)

Influencing Style Clock



## 10. Coaching & Getting the Best out of Others (Levels A & B)

How effective you are in your management role will depend not only on the results which you produce but also on the way in which you achieve these results through others. In your role, the way in which you manage and develop people is crucially important. Your ability to get things done through others will be dependent on how effectively you communicate, and more particularly, how motivated you make them feel. Whether you do this will ultimately depend on the quality of the working relationship which you offer, however transient or long term that relationship may be.

This module will focus on coaching people and getting the best out of others. It will help you to explore different strategies for building and maintaining effective relationships. It will also explore different ways in which you can deal constructively with those difficult situations that will arise and with those awkward people whom you are bound to meet; whether these are customers, colleagues or staff – the people you are responsible for developing.

### Objectives

At the end of this module you will be able to:

- establish productive, constructive relationships with team members, colleagues and customers
- identify who are your colleagues and customers
- develop relationships of trust with others
- offer advice and help to others within the organization relating to performance against established policies and values
- minimize and manage conflict creatively
- behave constructively in awkward situations.

### Underpinning Competencies

Directional Clarity  
Giving Clear Information  
Getting Unbiased Information

### Linked Assessments (where applicable)

Coaching Effectiveness Profile

## 11. Effective Leadership (Levels A, B & C)

Leadership in organizations is about setting goals and inspiring people who work in the organization to give a commitment to achieve those goals. There will obviously be different levels of leadership from those who lead thousands, those who lead hundreds and those who lead smaller teams, but they will still share the same function – to get people to do ‘the job’. How they do that will depend on their attitudes, their perceptions of what motivates people and the prevailing culture of the organization.

In order to make that choice you need to understand the differences between the various leadership styles and their strengths and weaknesses so that you can effectively lead the organization or department. This module therefore reviews some of the major leadership theories and styles.

### Objectives

At the end of this module you will be able to:

- differentiate between management and leadership
- recognize a range of leadership styles and select appropriate action as a leader/manager
- motivate others effectively having considered various approaches and models on motivation
- develop a plan for increasing the commitment that you earn from others
- continually review and develop your leadership style to get the best of others.

### Underpinning Competencies

Contextual Thinking (Level C)  
Change Orchestration (Level C)  
Reciprocal Communication (Level C)  
People Enablement (Level C)  
Creative Assimilation (Level B)  
Driving Persistence (Level B)  
Emotional Intelligence (Level A)  
Directional Clarity (Level A)

### Linked Assessments (where applicable)

Leadership Effectiveness Profile  
The Values Indicator

## 12. Effective Communication (Levels A, B & C)

Communication plays a crucial part in organizational success. Without effective communication systems and practices no organization will flourish and develop. At both the individual and the corporate level, there are complex issues to be explored.

This module starts with an exploration of what effective communication is and what happens when communication goes wrong. It gives you the opportunity to look at both the underlying process – how communication works – and the individual skills that make it work.

Matching the message to the situation and making sure that the right means of communication is selected are some of the central steps in a range of topics. Planning communication is also seen as an important element and is explored.

### Objectives

At the end of this module you will be able to:

- describe the key characteristics, components and purposes of communication
- establish the aim, bias and climate for your communication
- identify a range of organizational communication systems from which to select appropriately
- prepare and deliver Team Briefing within your organization
- differentiate the purposes and the contexts in which information and advice is provided
- structure information and advice to suit the audience, the situation and the purpose
- present information and advice in a format and in a medium appropriate to the situation.

### Underpinning Competencies

Listening and Organizing  
Giving Clear Information  
Getting Unbiased Information

### Linked Assessments (where applicable)

Listening Effectiveness Profile  
Communication Effectiveness Profile  
Communication Style Assessment

### 13. Developing Teams (Levels A, B & C)

Teamwork is an essential aspect of social existence. Whether we choose to be or not, we are members of many groups. We have to consider and co-operate with a wide variety of other people in the course of our daily lives. The social contracts we have with, for example, colleagues at work, family members and friends, are in some instances successful and pleasurable and in others not. This module sets out to explain how and why this is so and to help you understand that there is much we can do to make these relationships more positive and productive.

In particular the module focuses on the development of effective teams within the workplace. It starts by looking at what teams are and what it is that makes some teams more effective than others. The module then describes some of the factors managers need to bear in mind when forming or leading workgroups. It describes the classic stages of group development and identifies ways in which managers can facilitate the successful evolution of their teams.

Having established the features of effective teams, the module moves to show how managers can take a proactive role in analyzing group development needs and implementing programs which will meet those needs.

#### Objectives

At the end of this module you will be able to:

- describe the characteristics of an effective team
- form and manage a work group or team
- identify the strengths and weaknesses of the team, measured against work requirements
- establish and agree objectives for team development
- encourage team involvement in the preparation and review of their own development plans.

#### Underpinning Competencies

Directional Clarity  
Giving Clear Information  
Planning and Scheduling Work

#### Linked Assessments (where applicable)

Teambuilding Effectiveness Profile

## 14. Customer Focus (Level B)

This supplier/customer chain is central to the ability of any organization to delight its customers, survive and grow. As with any chain, the supplier/customer chain is as good as its weakest link, and if any link is not meeting its internal customers' needs the external customer has no chance of being satisfied, let alone delighted.

This module focuses on the identification of those needs and how you can plan to meet them. It will therefore take you through the stages of analyzing information and preparing plans which match your departmental or organizational operations to what your customers need and want. You will look at what marketing really means as a philosophy, as well as a range of techniques you can use. Throughout this module you will see clear emphasis on the essential recognition that customer needs are what drive effective and profitable organizations.

### Objectives

At the end of this module you will be able to:

- analyze market needs and opportunities
- collect information relating to customer needs
- recognize the various levels of customer service
- identify and develop customer relationships with your organization
- prepare marketing plans relating to the elements of the marketing mix; the 4 P's – price, place, product and promotion
- assess your department's or organization's ability to meet customer needs
- organize and present appropriate information to customers.

### Underpinning Competencies

Reciprocal Communication  
Listening Organizing  
People Enablement  
Identifying and Solving Problems

### Linked Assessments (where applicable)

Customer Commitment Profile

## 15. Presenting to Groups (Level B)

### *Elective*

We spend most of our lives speaking to one another; it is our natural communication channel. However, something strange happens to many people when asked to do the same thing in front of a group. A mere mention of delivering a presentation brings the nervous system into full operation. So why does this happen?

It is a mixture of things. It is fear of:

- falling flat on your face
- drying up
- losing your train of thought (mid-stream)
- what people will think of you
- being boring.

As you progress through this module you will learn how to prepare, plan and execute a presentation to a high standard. While the workbook does not include specific facilitation skills, many of the hints, tips and techniques can be applied in a number of different circumstances, including, advising and informing others, sharing ideas/information with your own team, taking a proposal to another team and making a presentation to people outside your organization.

### **Objectives**

At the end of this module you will be able to:

- explain what is involved in making effective presentations to individuals and groups
- plan and prepare effective demonstrations and presentations
- appraise the use of training aids and methods
- use appropriate behaviors and techniques to deliver effective presentations to advise and inform others.
- utilize effective questioning and feedback skills.

### **Underpinning Competencies**

Thinking Clearly and Analytically  
Giving Clear Information  
Creative Assimilation

### **Linked Assessments (where applicable)**

Presentation Style Assessment

## 16. Selection and Placement (Level B)

### *Elective*

People are the most important resource in any organization, but the role of human resources in different organizations varies widely.

In order to manage and maintain your human resources effectively it is important that overall staffing levels, the relevant skill and people mix are regularly reviewed against the requirements of the whole organization or department, before any efforts are made to recruit or redeploy people. This requires a systematic approach if it is to be successful.

This majority of this module is designed to support the manager who may be contributing towards staffing decisions and provide confidence to the manager who is responsible for specifying, assessing and selecting candidates against team and organizational requirements. This will be achieved by involving you in activities which prompt a systematic, professional approach to this part of your management role.

### **Objectives**

At the end of this module you will be able to:

- define future personnel requirements
- consider the main issues involved with the redeployment and redundancy of permanent staff
- determine specifications to secure quality people
- Interview people using behavioral/situational techniques
- assess and select candidates against team and organizational requirements.

### **Underpinning Competencies**

Listening and Organizing  
Giving Clear Information  
Getting Unbiased Information

### **Linked Assessments (where applicable)**

Interviewing Style Assessment

## 17. Managing in Context (Levels B & C)

The key purpose of management, as defined by the Management Charter Initiative (MCI), is:

**‘To achieve the organization’s objectives and continuously improve its performance.’**

If you accept this definition, there is no escaping your responsibilities to know what these objectives are and how the organization sees your role in helping to meet them – even if this does involve persistence, effort or even a role in helping to define them! The module entitled ‘Corporate Strategy’ will be extremely useful if you are to be involved in such work.

This module lays a foundation of management theory and principles to help you take a wider view of the knowledge and skills you are developing to manage operations as effectively and efficiently as possible.

### Objectives

At the end of this module you will be able to:

- describe the relationship between the manager’s role and the organizational context
- identify a range of organization structures to suit different purposes and assess the appropriateness of your own structure
- compare different theories of management and relate their significance to your day to day work
- identify the impact and effects of the relationship between the organization, the individual manager and the operations within your own span of control
- compare your own management style to that of other managers.

### Underpinning Competencies

Contextual Thinking  
Change Orchestration  
Making Decisions and Weighing Risks  
Appraising People and Performance  
Driving Persistence

### Linked Assessments (where applicable)

Management Effectiveness Profile  
Management Style Questionnaire



## 18. Operations Management (Level B)

### *Elective*

This module looks at principles and techniques which apply equally well to the effective running of service and manufacturing companies, to commercial enterprises and to public sector organizations. You will examine what it means to be in charge of an organized and planned work environment and how to get there if you are not already in that fortunate or well-managed situation. The intention is not to tackle the most technical and specialized techniques of operations management; it is to cover the broad range that applies to all managers, in offices, restaurants, manufacturing, building societies, shops, hotels and all others.

As you go through the module you will see clearly the inter-relationship between a range of management activities and responsibilities, such as quality management, the need to meet the requirements of internal and external customers, marketing research and communications. Where appropriate there will be 'signposts' out to other modules, so that you can explore specific topics in greater detail.

### **Objectives**

At the end of this module you will be able to:

- describe the importance of the supplier/customer chain which begins with your suppliers and ends with your external customers
- determine the importance of effective communications and feedback systems up and down the supplier/customer chain
- prepare specifications and schedules which are accurate and realistic and which meet customer requirements
- monitor the operations of your department or organization and amend them as necessary to meet changing customer requirements
- evaluate the potential of stock control and process systems for your organization or department.

### **Underpinning Competencies**

Making Decisions and Weighing Risk  
Setting Goals and Standards  
Planning and Scheduling Work  
Reciprocal Communication  
Getting Unbiased Information

### **Linked Assessments (where applicable)**

N/A

## 19. Managing Change (Levels B & C)

You will see in the module that some organizations can plan long-term change, with clear objectives and outcomes. Others have to cope with incremental change, perhaps with less clear outcomes, but even here the change has to be recognized, monitored and planned as a process. If change happens to you as a result of external pressures then you are in the hands of these forces.

As a manager you have to predict, make and manage changes or change will manage you. This is a constant challenge. People find change uncomfortable and threatening, and if you do not manage the process it becomes even more difficult as the pressures build up and reactions set in.

As one saying goes:

**‘People do not mind change –  
what they mind is being changed.’**

This module will help you understand and apply the principles of change as a means of effectively managing the improvements that you have to make as part of your normal work role.

### Objectives

At the end of this module you will be able to:

- collect and analyze information on current services, products and systems and on potential improvements and developments
- compare accurately the advantages and the disadvantages of current practice and proposed changes and identify possible obstacles to change
- produce plans and recommendations based on the analysis of the human and organizational impact and the drivers and restrainers of the change
- apply techniques of communication, negotiation and participation to the process of agreeing changes
- monitor and evaluate the effects of change.

### Underpinning Competencies

Change Orchestration  
Thinking Clearly and Analytically  
Appraising People and Performance  
Making Decisions and Weighing Risk  
Reciprocal Communication

### Linked Assessments (where applicable)

Change Management Effectiveness Profile

## 20. Managing Information and Systems (Level B)

### *Elective*

Communication has been defined as: 'the process of passing or exchanging information, ideas or beliefs'. Another definition is that it is: 'the transfer of an idea or of information from one party to another so that it is understood and can be acted upon'. Giving or receiving information is one thing. Doing so in a form that allows the information to be acted on is another. It requires clarity and fitness for purpose and is more difficult and complex than at first appears.

This module explores the process of communication and emphasizes the need to collect and apply only relevant and appropriate information in your role as a manager. With information coming at you from every side, the way in which you review and analyze what is important and what is not, will make a fundamental difference to the decisions you take and the advice and help you provide.

### **Objectives**

At the end of this module you will be able to:

- describe the key characteristics of effective communication and their importance in the workplace
- assess and evaluate information so as to identify trends and issues
- establish and maintain appropriate systems for collecting, reviewing and using information
- analyze information from a range of sources for use in the decision-making and problem solving process
- select and implement management and communication systems.

### **Underpinning Competencies**

Thinking Clearly and Analytically  
Listening and Organizing  
Reciprocal Communication  
Getting Unbiased Information

### **Linked Assessments (where applicable)**

N/A

## 21. Improving Financial Performance (Levels B & C)

How well is your organization performing? How can its performance be improved? Why is turnover up and yet profits are down? How effectively are you using resources? What can be done to improve the cash flow of the organization? How is your organization viewed by 'outsiders' and indeed do you assess other organizations?

Questions such as these are constantly being asked and a mass of accounting information is often given in an attempt to provide the answers. Many managers, however, fail to make effective use of the available information, simply because there is so much information available. In order to get the best out of such information managers must understand the main jargon used by accountants and be able to use some of the 'tools' or techniques which are available to analyze financial information.

This module examines the terminology you will encounter in 'internal' accounting information produced specifically for managers. The techniques of ratio analysis (based on the information contained in the published external financial statements) are also examined in terms of how they offer a practical technique for using the financial, accounting information, including the 'external' financial statements, to improve financial performance.

### Objectives

At the end of this module you will be able to:

- identify the elements and behavior of cost
- differentiate between the techniques of total costing and marginal costing
- select the most appropriate cost data for the use in decision making
- outline the principles of ratio selection and identify ratios which measure performance in selected areas
- use ratio analysis to monitor business performance and identify where and when action can be taken to improve performance
- describe the limitations of the results revealed in ratio analysis.

### Underpinning Competencies

Thinking Clearly and Analytically  
Setting Goals and Standards  
Planning and Scheduling Work  
Getting Unbiased Information

### Linked Assessments (where applicable)

N/A

## 22. Creativity and Innovation (Levels B & C)

Human creativity or innovation is a very large and complex subject area with a considerable amount of debate about what it is, and how it is practiced. To be creative or innovative can be said to be Original, Imaginative, Expressive, Ground breaking, Inventive and Idea generative.

The problem with all of the above creativity 'labels' is that they are context sensitive or relative terms. In other words, we can only be truly creative if we have an alternative or different perspective to everyone else (often in commonplace or familiar situations where most people think broadly in the same way). The reason for stressing this need for creativity to represent continually new and different approaches is to make the point that creativity does not occur as a phenomenon that is independent from its situational circumstances. In the same way, neither is creativity the domain of only creative 'types'. Hence, the reality is that in the right circumstances, any individual can be creative or be more creative than they were just by having a new or different view from everyone else).

This workshop looks at the whole subject of creativity and innovation from a personal and individual perspective and very much support the view that the skills and competencies of engaging in creative or innovative behavior are discoverable and therefore 'learnable' for every individual.

### Objectives

At the end of this module you will be able to:

- Identify the four phases that are involved in using creativity/innovation skill – INITIATE (I), DEVELOP (D), EVOLVE (E) and ACTION (A) – spelling the word 'IDEA'.
- Discover that increased creativity and innovation is possible for every individual no matter where their base skills start.
- Learn how to increase your levels of curiosity and to break your traditional thinking patterns to find new ideas or solutions.
- Recognize that all ideas need to be nurtured and (where possible) tested to ensure that they can be implemented successfully.
- Apply strategies to ensure that good ideas and creative thought succeed through high levels of personal courage and persistence

### Underpinning Competencies

Contextual Thinking  
Creative Assimilation  
Planning and Scheduling Work  
Reciprocal Communication

### Linked Assessments (where applicable)

Creativity Effectiveness Profile

## 23. Corporate Strategy (Level C)

This module looks at the process of a strategic approach to management from the wider strategic level to the operational level within the organization. It provides you with an overall foundation for strategic management and therefore for all the other modules in the 20/20 MDS™ series.

It explores issues in broad and strategic terms, giving you the opportunity to apply specific skills, knowledge and understanding to your own management role.

### Objectives

At the end of this module you will be able to:

- describe the relationship between the strategic, operational and tactical levels of management within an organization
- undertake an analysis of your organization, its external operating environment and the factors relevant to effective management
- evaluate competitors and collaborators
- analyze the culture, stakeholders, stage of development and internal strengths/weaknesses within your organization
- link strategies, plans, objectives and tactics to your organization's objectives
- establish the organizational context for the continuing development of your management skills, knowledge and understanding.

### Underpinning Competencies

Directional Clarity  
Thinking Clearly and Analytically  
Making Decisions and Weighing Risk  
Setting Goals and Standards  
Change Orchestration  
People Enablement

### Linked Assessments (where applicable)

N/A

## 24. Developing Individual Potential (Level C)

One of the most important resources an organization has is its employees. Their competence and commitment largely determine the objectives that an enterprise is able to set for itself and its success in achieving them. Market forces constantly force employers to pay particular attention to their personnel policies and practices. As a result, there is a growing need for more effective training and development of the human resource.

Effective training and development is achieved by creating the right conditions for them to take place. In this module we will not be mainly concerned with the actual teaching or instructing. Rather, we will be placing more emphasis on management's responsibility for the training and development of staff and on the individual's own responsibility for his or her own learning. We will also be looking at some of the mechanisms that the organization can provide for the development of its employees.

### Objectives

At the end of this module you will be able to:

- recognize the scope of your responsibility for self and staff development
- identify your own development needs and those of others
- recognize and make use of development opportunities
- identify individual learning styles
- negotiate individual development plans and learning contracts
- evaluate the effectiveness of self and staff development programs.

### Underpinning Competencies

Appraising People and Performance  
Training, Coaching and Delegating  
Setting Goals and Standards  
People Enablement  
Reciprocal Communication

### Linked Assessments (where applicable)

Developing Others Profile

## 25. Managing Performance and Projects (Level C)

One of your most important roles as a manager is to get results. This means that you need to:

- find the best ways of achieving your unit's/department's goals and objectives
- make sure that your staff involve themselves in helping to achieve those goals
- design systems and processes that make the best use of available resources.

This module is designed to give you the expertise and the tools to enable you to do these things.

The module starts by looking at mission statements, goals and objectives and the factors you need to be aware of when defining or using these. Subsequent sections focus on the importance of gaining the commitment of your team by delegating and allocating responsibilities effectively. The workbook also explores the area of process and project planning which helps you to ensure that staff are using the most cost effective working methods and processes. Finally, it examines how appraisal systems and feedback can help people to feel valued and encourage them to give their best.

### Objectives

At the end of this module you will be able to:

- set and update work objectives for teams and individuals
- delegate effectively
- define and allocate responsibilities and authority (and plan activities/determine appropriate work methods)
- encourage the active involvement of staff in the achievement of work objectives
- encourage individual performance and development through the use of an appropriate appraisal methodology
- provide effective feedback on performance.

### Underpinning Competencies

Appraising People and Performance  
Training, Coaching and Delegating  
Setting Goals and Standards  
People Enablement  
Reciprocal Communication

### Linked Assessments (where applicable)

N/A



## 26. Corporate Finance (Level C)

Managers who are non-accounting specialists are increasingly being required to make decisions based on financial data.

This module will help managers understand the basic financial accounting statements produced by organizations and will outline the information which companies must present in order to comply with the prevailing laws and regulations that relate to accounting and finance practices. It will also explain why profitability and liquidity are quite different aspects of financial performance.

You will be introduced to the balance sheet, profit and loss account and cash flow statement.

An understanding of the nature and purpose of these financial statements and the key accounting 'jargon' contained therein, is essential for anyone seeking to interpret and use such information.

### Objectives

At the end of this module you will be able to:

- outline the methods of presenting the balance sheet and the profit and loss account
- identify and define the main components of the balance sheet and profit and loss account
- identify the types of accounting information that has to be published by companies who are required to comply with the Companies Act
- explain the purpose of a cash flow statement and identify reasons why a profitable business could have cash flow difficulties
- explain the difference between profit and the concept of Added Value.

### Underpinning Competencies

Contextual Thinking  
Thinking Clearly and Analytically  
Making Decisions and Weighing Risk  
Setting Goals and Standards  
Reciprocal Communication

### Linked Assessments (where applicable)

N/A

## 27. Budgeting and Investment Appraisal (Level C)

Managers plan and control not only their own work but also that of their colleagues. Whether this is related to a specific project (such as a one-off situation) or an on-going manufacturing unit or service area, it is imperative that the person involved is aware of the likely cost consequences of any decision made. Planning and controlling costs should go hand in hand with the planning and controlling of the business activities.

This module examines the techniques of planning and control in a management accountancy framework. It will show why planning and control are different, and will introduce some methods for planning and controlling the cost of a product service, production line or manufacturing unit.

### Objectives

At the end of this module you will be able to:

- describe the importance of financial planning and control
- explain how budgets can be produced and how they may be used as a control mechanism
- outline the merits of operating a flexible, as opposed to a fixed, budgetary control system
- identify the reasons why variances may arise and suggest their possible causes
- identify the major stages in the capital investment decision
- explain the concept of the time value of money
- distinguish between the various techniques of investment appraisal
- compare and contrast the various techniques of investment appraisal in order to select the most appropriate for particular circumstances
- interpret an investment appraisal schedule and identify how risk and uncertainty affect investment decisions.

### Underpinning Competencies

Making Decisions and Weighing Risk  
Appraising People and Performance  
Thinking Clearly and Analytically  
Identifying and Solving Problems  
Reciprocal Communication

### Linked Assessments (where applicable)

N/A

## 28. Creating a Productive Work Environment (Level C)

### *Elective*

Establishing and maintaining a productive environment in which to work (whether you are a manufacturing, service, public or voluntary organization) is one of the key areas of a manager's responsibility. You must have the right resources available, in the right quantities at the right time if things are to flow smoothly. Equipment has to be in working order and capable of doing its job or there will be downtime, waste and a drop in productivity that could be very hard to overcome.

Clearly, you have to remain within the legal framework that applies to the workplace and this can appear to be complex and confusing. As with the other elements that this module covers, it requires a cool and logical approach to ensure that the simplest issues as well as the most complex are clarified and made explicit.

Some of the underlying themes in this module are explored in greater detail in other modules, in particular 'Operations Management' and 'Satisfying Customer Requirements', which applies to you as a supplier and a customer to your internal and your external customers.

### **Objectives**

At the end of this module you will be able to:

- identify external suppliers able to meet your criteria and develop sound relationships with them
- maintain a sufficient supply of acceptable resources for your operations to meet internal and external customer requirements
- plan and work to maintenance schedules
- establish systems for reporting accidents and areas for improvement.

### **Underpinning Competencies**

Appraising People and Performance  
Change Orchestration  
Training, Coaching and Delegating  
Setting Goals and Standards  
People Enablement  
Driving Persistence

### **Linked Assessments (where applicable)**

Developing Others Profile

## 29. Managing Risk (Level C)

### *Elective*

These turbulent times have meant increased awareness of risk management. Given the high stakes in today's business world, it's easy to see why risk management has become the key buzzword in recent times. Risk includes human, market, financial risk and operational risk. The Managing Risk module provides a comprehensive description and analysis of modern risk management, including regulatory aspects, organizational issues, potential problem areas, and tools to control and manage the many different kinds of risks. It also discusses: structuring and managing an effective risk management system.

This module will provide participants with a sound understanding of the whole subject of risk and how to manage it more effectively at all levels, including strategic, program, project and operational risks. This course will enable participants to describe what risk management is about and be able to talk confidently about risk management issues with colleagues as well as understand how to communicate and report risk related information.

### **Objectives**

At the end of this module you will be able to:

- Understand the whole concept and implications of risk in the workplace
- Classify different types of risk
- Determine process and organizational risks that need to be managed
- Utilize a simple risk assessment process
- Apply appropriate risk controls according to a specific hierarchy

### **Underpinning Competencies**

Making Decisions and Weighing Risk  
Contextual Thinking  
Getting Unbiased Information  
Appraising People and Performance  
Thinking Clearly and Analytically  
Creative Assimilation

### **Linked Assessments (where applicable)**

N/A

## 30. Continuous Improvement (Level C)

### *Elective*

Many organizations would argue that it is far better 'sitting on the touchline', finding holes in the models, or creating any other historical reason for 'staying as we are', rather than applying continuous improvement concepts. However organizations in this frame of mind are unlikely to survive the next decade.

Those interested in quality, and who are also interested in perfection, are really struggling because the world cannot yet offer you a quality model that is perfect, but we are getting nearer to something we can all buy into.

As you work through this module, we will not be advocating a 'quick fix' new model, but will be providing you with an insight into what has gone before, and what exists today, so that you can select or create an approach that works for you and the stage of development of your organisation. You will find it helpful to refer also to other modules in the series, such as 'Operations Management' and 'Customer Focus', as the concepts and issues in continuous improvement do not stand apart from these other areas.

### **Objectives**

At the end of this module you will be able to:

- consider a variety of models relating to continuous improvement
- make recommendations for quality systems which are realistic and appropriate to your customers' requirements and organizational goals
- apply the principles of consultation, communication and involvement at all levels in the organization
- set up quality circles or teams in your department or organization
- use a range of techniques, principles and methods to identify and plan continuous quality improvement

### **Underpinning Competencies**

Appraising People and Performance  
Training, Coaching and Delegating  
Setting Goals and Standards  
Counseling and Disciplining  
Identifying and Solving Problems  
Driving Persistence

### **Linked Assessments (where applicable)**

Quality Effectiveness Profile