Management Development Program

Module 1
Management Basics

Contents

1.1 Challenges and Rewards

What are the greatest challenges facing you as a manager at BACP?

What are the greatest rewards?

1.1.1 Challenges and Rewards

Discuss in small groups the two questions posed above and write your own conclusions here.

It's tempting to focus on the discussion for exercises like this, and not bother writing anything down. However, if you don't make notes, you'll have nothing to reflect on and compare later. Capturing your thoughts is a vital part of the learning process – start now.

1.2 Challenges and Rewards

Probably the greatest challenge you face as managers at BACP is that your role also requires you to deliver operational tasks. Your time and attention are divided between managing your team and answering emails, writing reports, fixing problems, meeting stakeholders, speaking to members, and all of the other things that your job entails.

The greatest reward comes from delegating all of that.

1.3 What Makes the Best Managers?

How do we define 'best'? What does it mean?

If BACP was a retailer, would we simply be talking about the managers of stores with the highest turnovers and profits?

Or maybe the managers whose admin is always correct, with accurate orders and stock checks?

Are we talking about the managers who have the most motivated, loyal teams?

What about the managers who deliver great service to their customers?

In BACP, it might seem more difficult to measure the performance of a manager, and consequently it becomes difficult to define what makes the 'best' managers. And yet, you definitely know when you are working for one.

One of the aspects that makes it hard for some managers to balance these priorities is that the answer depends on who you are, and what your relationship with the manager is.

For example, if you're a customer, you'll see customer focus as the most important. If you don't serve your customers, you don't have a business. However, there are other priorities too which could prevent you from serving customers.

What do we even mean by customers? Do we mean members? Or the clients served by your members? Or the general public? Or some other group of people?

If you can't define your customers, how can you serve them?
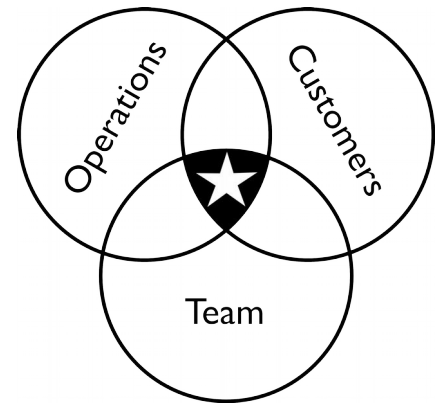
When we look at line managers in all kinds of different companies, we can see three areas of focus that they have to balance. There's the team itself, the operations of their part of the business, and the external customers or stakeholders of the organisation. Some teams seem more obviously connected with external stakeholders than others.

The best managers understand that they're not an island; they're an important part of a system that connects suppliers with customers. In BACP's case, there are the regulatory requirements of managing professional members, plus the interaction with the public who are working with those members, plus the expectations that those members have of a membership organisation. This complex system works to give a client, a member and a BACP manager a way of interacting and delivering value for each other.

The best managers understand where their team fits within this system, but they also know that to get the best results, they have to focus on what they can influence directly, and that is within the three areas of operations, customers and their team.

You won't be surprised to hear that the best managers are those who balance all three, and you'll be relieved to hear that they don't do it all by themselves - they have a lot of help. In fact, there's a direct connection between success and the amount of help you get.

1.3.1 Focus

Discuss the consequences of focus with your colleagues and write your conclusions here.

If I focus on...	Then the things that happen are...	But the things that get missed are...
Operations		
Team		
Customers		

1.3.2 Team Building Exercise

In this exercise, you'll be competing in two teams for a prize.

A maximum of 30 minutes is allowed for the task.

Outside of the room is a model which you must reproduce using the parts supplied.

You have all of the parts required to reproduce the model.

Only one member of each team is allowed out of the room at any time.

No writing materials, mobile phones, cameras etc. are allowed outside of the room.

You may not touch the model that is outside of the room.

You may not interfere with the other team's model.

You may look at the model as much as you like.

Any one member of your team may look at the model as often as you like.

When your team believes that your model is complete, shout out and your time will be recorded.

Your team's score will be calculated as the time it took your team to finish your model, plus a 2 minute penalty for every piece not in the correct place relative to the reference model.

After 30 minutes, all teams will stop work.

The winning team will have the lowest total score.

1.4 Delegation

You probably think that you are already good at delegating, because:

- You often delegate tasks to your team

- You give clear instructions about how to carry out the task

- You check in and offer advice if you can see problems arising

If you do any of these them, unfortunately, you are not good at delegating. In fact, you are causing more work for yourself and for your team, you are limiting the growth of your team members, and you are micromanaging.

The bottom line is this - the only way that you can manage your area of responsibility effectively is to delegate as much and as often as possible.

If you're thinking that you don't have time to delegate, or you can't trust your staff to do things as well as you do, then you might be mistaking delegation for abdication.

When you delegate, you give someone else the resources and the authority that they need, but you always keep accountability for it. When you delegate, you need to give the person a clear description of what you want to achieve but stop short of telling them exactly what to do. If you give detailed instructions of how to complete a task then you are not delegating, because you are not utilising that person's innate experience, creativity and free will. In fact, you are treating them as an extra set of limbs who only need to follow your instructions.


When you abdicate, you give up accountability for the task, typically explaining at length what you want the person to do, but not what you want them to achieve. Ironically, while you think you're helping them with step by step instructions, you're actually making it impossible for them to complete the task as you intend.

You might justify this by saying that it's a sign of trust. It isn't. By allowing staff to take more responsibility without delegation is a sign that you are happy to let someone else do the job for you,

and unfortunately, if it goes wrong, you will not be in control but you will still be accountable.

Managers who abdicate tend to make staff into 'milk monitors', wholly responsible for a set of tasks. Those staff then tend to overstep their authority and take on more because they enjoy the feeling of power and independence.
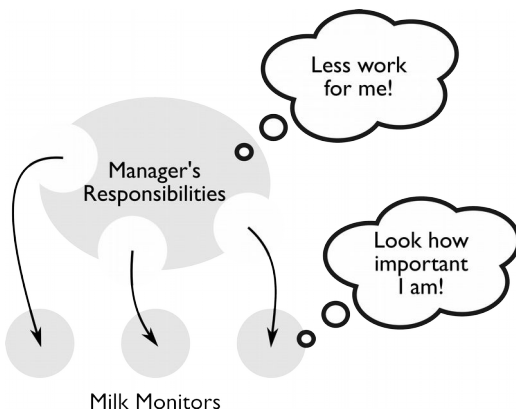
If one person is good at a particular task, you might just leave them to get on with it. You think that you'll never have to worry about that task again.

Abdication is not a sign of trust, it is a sign that you don't care about something that you are responsible for.

What can happen is that other staff follow your lead and leave them to it too. Instead of taking responsibility for tasks that they can see need taking care of, they leave them to pile up, thinking, "If Pat's so clever, she can do it". If they're feeling particularly resentful, they might even deliberately cause problems to make Pat look stupid. So by relying on particular staff to always do a certain job, what you actually create is gaps that no-one is responsible for, and no-one is interested in. By abdicating, you make more work for yourself.

It's all very well taking our word for it, but you need to understand the importance of delegation for yourself, otherwise you'll never get round to doing it. It will always be easier just to do something yourself, just this time, and explain it to someone else next time. Next time never comes.
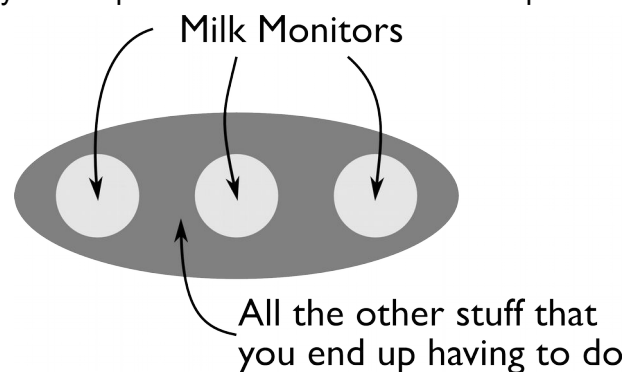
One of the most important jobs for a good manager is education. By making sure your staff are trained to the right level and that they understand the standards that they need to work to, you can delegate very quickly and easily without having to explain yourself every time. Education is an investment that the worst managers don't make time for, but that's like saying that you don't have time to pack for your holidays, or you don't have time to buy Christmas presents, or you don't have time to get your partner a birthday card.

You might save yourself a little time now, but you'll pay the price later.

When you delegate a task, you are delegating the authority to complete the task, but not the responsibility for it. Ironically, managers who abdicate tend to do the opposite, they abdicate the responsibility for the task, but not the authority to get it done, so that when the person performing the task fails, it will be their fault, even though realistically they could never have succeeded.

To delegate effectively, simply remember that you need to give your team AIR:

Authority	The Authority to make decisions in order to complete the task you're delegating
Information	The right Information to make good decisions to complete the task
Result	The end Result that you want, and a way of measuring that it has been achieved

The most vital thing to remember about delegation is that you are delegating not only a task, but also the authority to make decisions that are necessary to complete that task. Delegation is a shift in decision making authority from one level of an organisation to another – this is why people who go to conferences on behalf of their employers or governments are called delegates; because they have *delegated authority.*

When you order your shopping for delivery from a supermarket, you can decide whether to permit them to make substitutions for any out of stock items. A substitution is a delegated decision, and it doesn't always work out as you had intended. If you order flour and get cake mix instead, you might imagine that the picker in the store did their best to guess what you wanted the flour for, and made a reasonable substitution from their point of view, given the information they had.

Authority   Information   Result
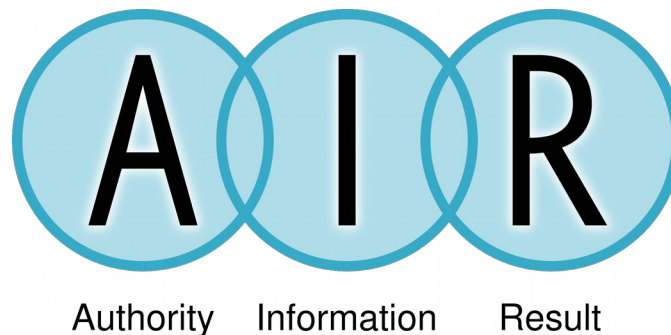
1.4.1 Delegation

We'll split the group into two teams for this exercise.

Create three tasks to delegate to the members of the other team.

1. Very challenging and complex

2. Challenging but achievable

3. Very basic and easy

Write your three tasks on a piece of flipchart paper, numbered as above, and give it to the other team.

By yourself, look at the three tasks that the other team created and judge each one on the scales below by putting a mark in the relevant box, where 1 is low and 9 is high. Be totally honest.

| Task	1	2	3	4	5	6	7	8	9
1:									
How difficult is the task for you?									
How motivated do you feel about the task?									
2:									
How difficult is the task for you?									
How motivated do you feel about the task?									
3:									
How difficult is the task for you?									
How motivated do you feel about the task?									

Discuss the results amongst your team, and then work out what this means for tasks that you delegate to the team that you manage. As a team, present your conclusions to the whole group

Research into motivation and delegation conducted at Trinity College in Dublin concluded:

"So if a principal can plausibly convey her motives to her agent, she can very well change his beliefs and perceptions."

In other words, when you delegate a task, if you can convey exactly what you want, you actually influence the mindset of the person you're delegating to, so that they become your 'eyes and ears' in the task.

So for all you control freaks who don't like to delegate because things don't get done the way you want, the problem may well lie in your ability to convey what it is you want, rather than your staff's ability to do what they're told.
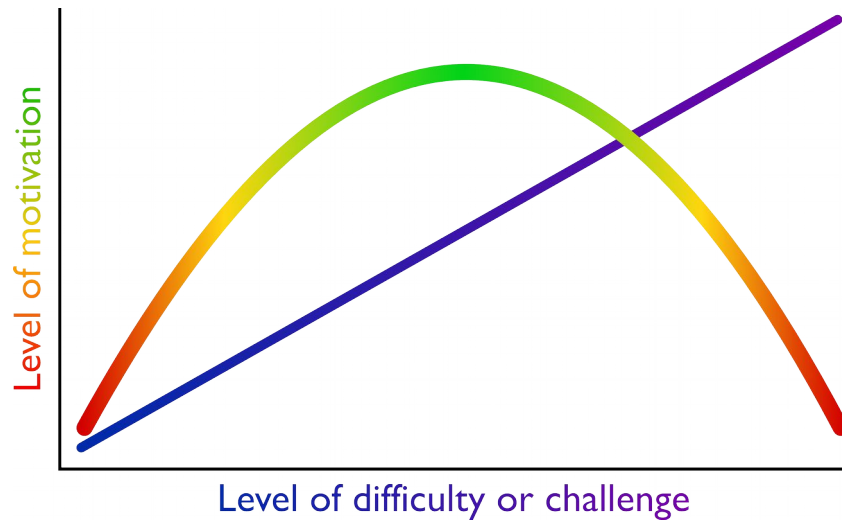
One of the other interesting findings from this research is that there is a trade-off between the difficulty of a task and the person's level of motivation, like this:

What this means in practice is that each member of your team has a level of difficulty that motivates them most. If a task is less challenging, it's not interesting enough to motivate them, and if it's too difficult, they don't have enough knowledge or belief in their abilities to be motivated.

Your aim as a manager is to identify that 'green zone' where the right level of challenge creates the most motivating and rewarding environment for your staff.

1.4.2 Finding the 'green zone'

Here are five tasks that you might delegate. Discuss with your colleagues how the different staff in your team might be motivated differently by them.

1. Conduct some member research

2. Recommend a new piece of software

3. Tidy the store cupboard

4. Show a new member of staff round the building

5. Speak about a project at the next SMT meeting

What do you notice?

Of course, this optimum motivation point does not stay still; it is connected to learning. When you take on a new task, it's challenging at first, but as you master it, it becomes less challenging and less interesting. People who are motivated to learn will want new challenges, and people who are motivated by a safe routine will avoid new challenges.

Game designers understand this trade-off between challenge and motivation very well, exploiting it in games such as Angry Birds or Candy Crush.

Each level gets slightly harder, and just as you're getting the hang of it, the rules change so that you have new features to master. The game monitors your activity, so if you seem to be losing interest because a level is too difficult, the game makes it easier for you. When you're hooked by your own desire to win, you're more vulnerable to the new economy of 'in-game purchasing'.
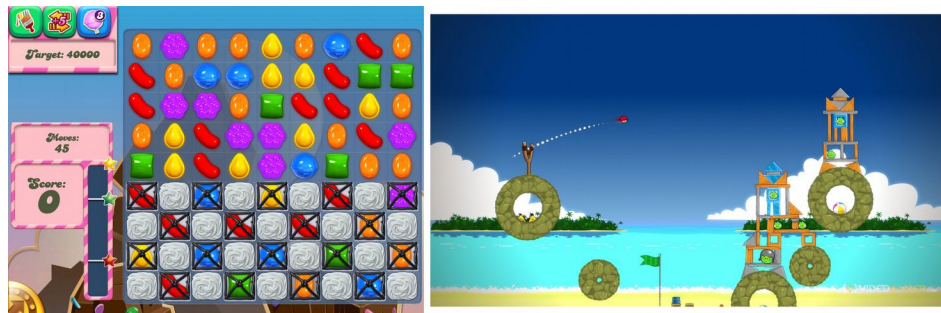
We need to delegate tasks in the right way to the right people at the right time. By getting to know your team, you'll be able to figure out who responds best to what level of challenge given their **current** level of knowledge and experience.
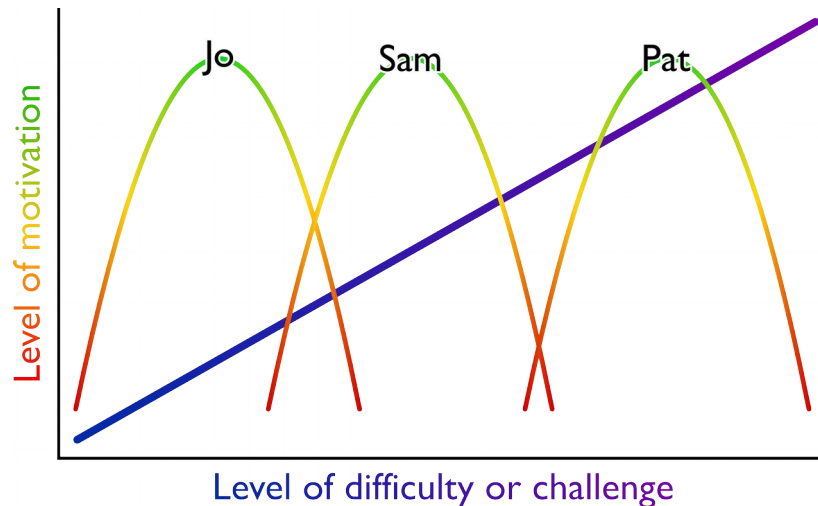
Not everyone is motivated in the same way by the same things. One member of staff might jump at the chance to show initiative and creativity, another loves repetitive tasks which they can get into a routine with.

Most importantly, understand that your staff may not have the same level of ambition that you have, and they are not motivated by the same things as you. We'll talk about this more in the next module, 'Managing Performance'.

Getting to know your team doesn't mean finding out about their hobbies and interests, it means that you can build a profile of each team member's competencies and capabilities.

Competencies are skills that a person can demonstrate now. You can measure a person's performance and build a competency assessment that shows the level that they can consistently perform at.

Capabilities are skills that a person can demonstrate when given an opportunity. You don't need to guess at capabilities, you can delegate challenging new activities and observe how someone performs. Capabilities are closely connected with that person's individual aspirations.

1.5 Ownership

The best managers have a strong sense of ownership of their teams, but they're not empire builders.

On the other hand, managers who are empire builders see the team as their territory, which they defend against outsiders.

This damages your ability to delegate and loses you the respect of your team.

This is another skill of the best managers that works the opposite way to how you might think.

The worst managers see the department and team as their **property**.

They think that senior managers are there to police and **control** them.

When they announce an instruction that's come from 'the top', they say, "**We've been told** to do this, I don't like it any more than you do but we've got no choice".

They think of themselves as a member of the team, in that they hide within it and make 'senior managers' the enemy. They don't have a strong sense of their own identity as a manager, and they **avoid responsibility** for what happens in the team - unless it's good, of course, in which case they're happy to take the credit.

Their teams don't respect them because they know that the manager isn't really part of the team, they're just hiding behind them. Because they know that the manager doesn't take responsibility, they don't take delegated tasks seriously.

The team members know that the manager is **not** the boss.

The best managers see the department and team as their **responsibility**.

They recognise how senior managers can **support** them and help them to succeed.

If they disagree with a change, such as a new process or new working conditions, they argue their case with their manager. Sometimes they are successful in influencing events. Sometimes, the unwelcome change stands and they accept it.

When they announce an instruction that's come from 'the top', they say, "**I want** you to do this".

They think of themselves as a member of the team, in that they wouldn't ask their team to do anything that they wouldn't do themselves, so there's no sense of superiority. However, they don't hide in the team, they **take responsibility** for everything that happens, unless it's good, in which case they make sure their team get the reward and recognition too.

The team respects the manager because they know that the manager will look after their best interests, treat them fairly and protect them. On the other hand, because the manager takes responsibility, the staff know that they have to answer to him or her for delegated tasks.

The team members know that the manager **is** the boss.

1.6 Accountability

The best managers are accountable for the success of their teams, and they hold their staff accountable too. However, you cannot teach someone to be accountable, and you cannot make someone accountable. You can only **hold** them accountable, and they have to accept that and be prepared to deliver on it – or not. The choice is theirs, to be part of the team or not.

Accountability is passed down the management chain as part of the process of delegation. Everything that you do as a manager is delegated from your manager, and in turn you'll delegate many of those tasks to your team leaders or team, otherwise you won't have any time in the day for all the other things that you need to do, such as motivate your team, build customer relationships, create a team strategy, develop yourself, and take time off!

The odd thing about accountability is that some managers mistake it for control. They think that the more control they hang onto, the better their team will run. They think that by dictating not only what staff do but exactly how they do it, the team will run perfectly.

You probably know how it feels to have someone explain to you, in great detail, how to do something that you already know how to do. You might even feel insulted, as if the other person thinks you're stupid. But from that person's point of view, they just want to make sure the job gets done properly, exactly the way that they would do it.

This is the bottom line with managers who fail to delegate - they believe that the only way to get a job done properly is the way that they would do it.

However, the more you try to control how staff get things done, the more they give up accountability. After all, if you're going to think for them, why should they bother?

Before long, you'll be frustrated that, even though you explain everything to them, they still make mistakes and get things wrong.

Why does this feel frustrating for the controlling manager? Because the staff are the ones in control. The more that staff are in control, the more accountability gets pushed back onto the manager.
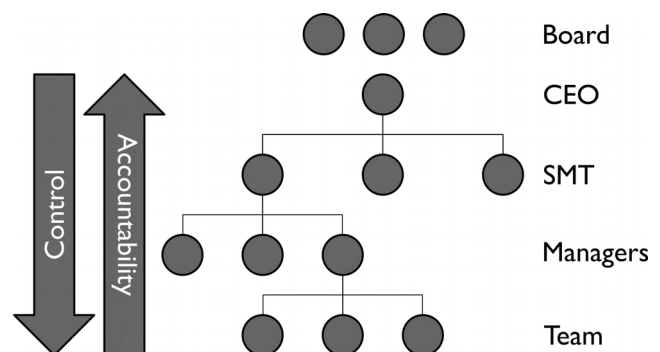
The controlling manager is in an impossible position; the demands of the business aren't going to go away, but their staff aren't able to work independently. All of the pressure is on the team manager. The demands of the business push down on them, and the demands of their staff and stakeholders push upwards. Caught in the middle, controlling managers eventually crack...
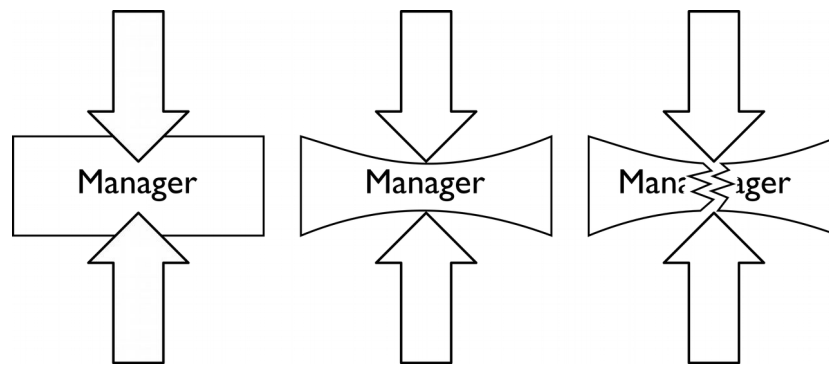
Let's compare an example; a finance report containing incorrect information.

A controlling manager will notice the error, correct it and then tell the person who prepared the report how to recognise future errors and what to do about them. This all goes in one ear and out the other, because the person in question already knows all this; they just don't *care*. Why check your own work if someone else will always check it for you? What incentive do they have to learn?

Because a controlling manager 'micro manages' their staff, their staff have no incentive to think for themselves. They might even feel that their initiative is discouraged, because the manager only wants things done their way. Staff become disengaged and the manager's workload increases. Perhaps staff don't check their work because the manager always seems to find fault in what they do? Staff don't try to excel, because they don't see a connection between performance and pay or promotion prospects.

A delegating manager will create systems and processes which define measurable outputs. The manager's job is not to double check the work of others, it's to hold people accountable to those standards. If the manager notices the error, they will go to the person who prepared the report. They'll ask the person what they see, and if it meets the agreed standards. They'll leave the person to correct the error. Whether the person took the right action before or after the manager found the problem makes no difference to what they have to do. The difference is that they now have their manager checking that they're following the right procedures, and their error might well affect their next performance review, which in turn affects their pay and promotion prospects.

A delegating manager holds their staff accountable for the tasks that are delegated to them, which means that the manager is in control of results and the staff are in control of how they achieve those tasks. By being able to use their initiative, staff will be able to improvise and adapt to changes, and they'll discover new, better ways to get things done. They'll want to excel and be part of the team's success.

In the finance report example, the staff might figure out new ways of checking reports which help them to work more efficiently.

The manager keeps hold of the standard to which the staff should perform their work. By holding staff accountable, the manager maintains control and creates an inspiring environment for staff where they have the freedom to use their initiative, develop in their roles and be rewarded for what they do best.

Of course, people aren't either controlling or delegating to the extreme; they're somewhere along a spectrum. And it isn't a question of where you are right now; what you must decide is where you want to be, and how you get there.
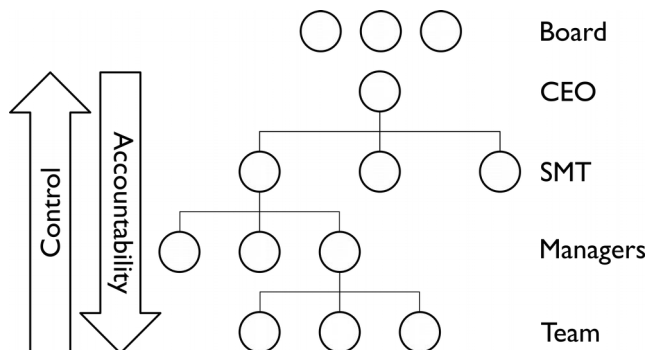
1.7 Standards

The best managers have high standards in all areas of team operations. They delegate accountability for these standards to their staff as much as they can, otherwise the standards are only met when the manager is watching.

The best managers make sure that their staff understand the standards expected of them, and we could really say that a standard is a result or a goal. For example, an IT problem isn't fixed when the faulty hardware is replaced, it's fixed when the hardware is replaced, the fault ticket is updated, the user confirms that they are happy and the fault report is closed. When we focus on the task itself, we leave the admin until later, like the DIYer who finishes decorating but never gets round to putting their tools away.

For an effective manager, the admin IS the task.

1.8 Fairness

The best managers evaluate and reward their staff fairly, with no favouritism or bias. Showing bias of any kind creates a disjointed team, with cliques, favourites and people who feel that they'll never be recognised for their work, so they might as well just do the minimum that they can get away with. Business psychologists have done a lot of research in this area, and have identified six types of bias which can affect how staff performance is measured.
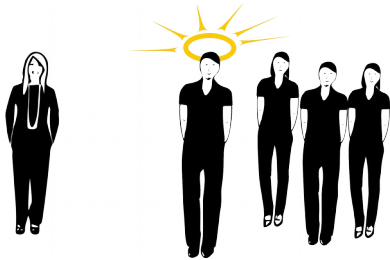
The Halo Effect

"Everything Pat does is great"

The manager judges a person's performance based on a small number of achievements and overlooks other problems which need attention. This would be like a film critic recommending a film when they had only seen the trailer.
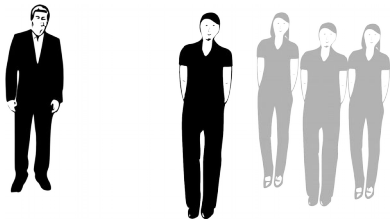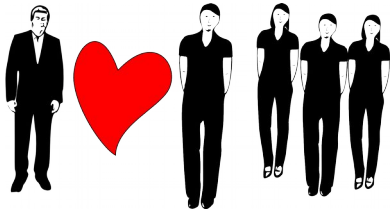
Contrast

"You're not as good as Pat"

The manager compares a person to other staff rather than to an objective set of standards or to the job specification.
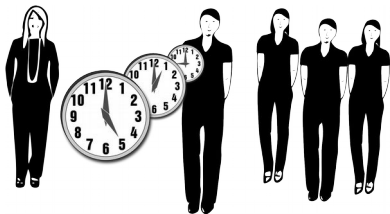
Recency

"I don't care what you did last month, you gave wrong information to a member this morning"
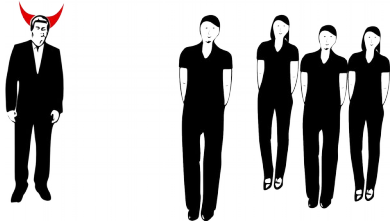
The manager judges performance, either good or bad, based only on recent events.

Leniency

"My team are all great"

The manager views performance too positively, either because they avoid giving critical feedback, or they are too 'friendly' with their team. Sometimes, a manager is too lenient because they are using their team to make themselves look good.

Severity

"None of my team pull their weight"

The manager is too harsh because of high expectations or perhaps wanting to appear tough or strict.
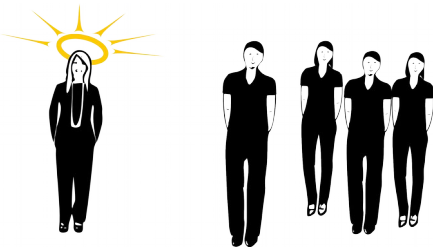
Self-Serving

"My team's performance is all thanks to my great management"

The manager believes that they are responsible for the success of the team, so they under-rate good staff but then blame the team for poor performance.

You might think of other ways in which a manager would be biased towards different people in their team, for example ageism, racism or sexism. The important thing to remember is that those examples are usually obvious and, of course, illegal in the workplace, whereas the biases shown above are often so subtle and ingrained into the manager's way of working that the manager may not be aware of them.

The solution for bias is simple – don't judge your team based on what you feel or what you react to or even what they say - judge them against objective, measurable standards. Judge them on what they do, not on what they say they're going to do, or on what you have to tell them to do.

Using external standards, or even having someone else help you with the assessments, will show up any biases you have. For example, if a member of staff has achieved the standards that you set for picking orders, how you feel about that achievement tells you about any bias that you might not be aware of.

The Halo Effect	Of course they met the standard, they're brilliant at everything.
Contrast	I suppose they met the standard but they still weren't as good as Pat. Or… They didn't quite meet the standard, but at least they're better than Pat.
Recency	Yes, they met the standard, but this morning they didn't clear away the boxes, and yesterday they didn't answer the phone quickly enough.
Leniency	They needed a lot of reminding, but they're new, and they're busy, and I ask a lot of my team anyway, and they're going through some personal problems right now so I won't mark them down for that.
Severity	They met the standard on paper but I still expect more of them. I still have to remind them to do certain things, and they don't show enough initiative, and when they do it's never right.
Self-Serving	They only met the standard because of my constant reminders and excellent management.

When you use external standards, you will be able to:

- Assess all staff fairly, equally and regularly

- Demonstrate your assessment method

- Give your staff standards to work towards

- Recognise and reward your staff for long term achievements

- Create standards that don't need you to watch over your staff

- Build a team of motivated, dedicated staff

- Delegate responsibility

- Build a self managing, high performing team
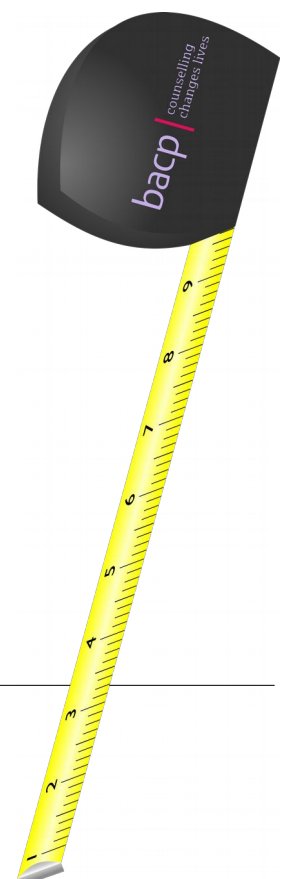
1.8.1 Bias

It's likely that you've already experienced examples of bias. Working as a team, come up with at least one example of each type of bias, explore what impact this had on the people involved and come up with ideas for what could have been done differently.

	Example	Impact	Suggestion
The Halo Effect			
Contrast			
Recency			

Leniency			
Severity			
Self-Serving			

1.8.2 Fairness

Make a list of some objective measurements or standards that you can use to assess the performance of your team, and add some notes about how you would use them,

Standard	How do you use it?

Can you see what the golden rule is for any measurement or assessment?

Tell the person being measured what they are being measured on, what the criteria are and what will happen if they fall short of or exceed the required standards – all before they do what they're being measured on.

For example, let's say you prepare a presentation and your manager says that they don't like it. If they didn't say beforehand that 'liking' was one of the performance criteria, it's not valid feedback.

You can always expect performance measurements to evolve, because people tend to find ways of doing things that you hadn't expected.

The most important factor in performance management is that once you have set targets, criteria and consequences, you stick to them, no matter what. If you fail to hold your staff accountable for what they agree to deliver, you will teach them that they don't need to take you seriously, and you won't be treating them fairly. By sticking to what you promise, you make life so much easier for yourself and better for your team.

1.9 Summary

1.9.1 Conclusions

We'll split the group into two teams.

You have 20 minutes to put together a 10 minute (maximum) presentation, which should include:

- Your explanation of the difference between delegation and abdication. You might want to use your presentation team to demonstrate the difference, rather than just telling us.

- Examples of the different types of bias that managers might have when evaluating staff performance.

- Ways to overcome bias, and reasons why it is important to do so.

- Factors for good delegation.

- Suggestions for how to measure the business impact of delegation.

Your team will be scored out of a possible 100 points, as follows:

Maximum 25 points - Understanding of key learning points

Maximum 25 points - Demonstration of how to apply the theories discussed

Maximum 25 points - Understanding of financial and business impact of delegation

Maximum 25 points - Collaboration of presenting team and engagement with audience

Your team's score will add to your individual assessment score.

1.10 Assignment

During this coming month, you'll be delegating tasks to your team, concentrating on the good practice that we've worked on today.

Your assignment is simply to write a 600-ish word analysis of your experience over the next two to three weeks as you work on improving your delegating practices. Within your analysis, choose three specific instances where you delegated a task:

1. One where the result was exactly what you had hoped for

2. One where the result was less than what you had hoped for

3. One where the result exceeded what you had hoped for

Work out what happened in each instance and suggest what you could have done differently.

Summarise what you have learned, overall, about the art of delegating.

Email your assignment by the due date show in the schedule to peter@genius.coach

Authority   Information   Result