Management Development Program

**Module 3
Resource and Project Planning**

Contents

3.1 Resource planning

A manager has to balance many different priorities. An effective manager needs to have excellent time management skills, and they need to extend these skills to the whole team and operation, otherwise they risk becoming controlling and isolated. Assigning roles and tasks to the team is done through team meetings, and this is the basis for building a team culture that operates effectively, whether the manager is there or not.

When your focus is on delegating tasks, if those tasks aren't carried out as you had intended, it's a learning opportunity.

When your focus is on maximising team performance, if delegated tasks aren't carried out as you had intended, it can affect the performance of the whole team.

Perfect resource planning depends on perfect team performance, which in turn depends on the solid foundations of delegation and performance management.

Resource planning also depends on you knowing your team well, and on every member of your team being able to deliver everything defined in their role profile.
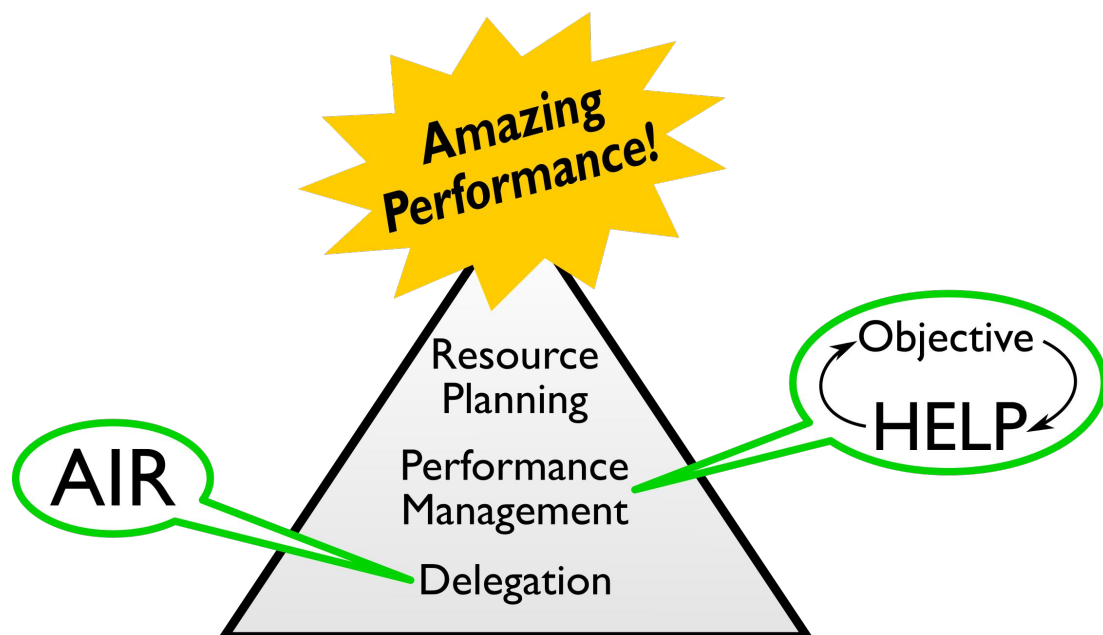
How does this fit with the course modules we've completed so far?

- Delegation develops your team and frees up your time for more valuable activities.

- Performance management creates efficiency and autonomy in your team.

- Resource planning allows you to create long term activity plans, projects and development plans for your team.

Long term planning means that you not only have to understand the capabilities of your team today, you must also have development plans in mind which enable them to deliver more in the future, whatever 'more' might mean to you and your staff.

Not only do you need every member of your team to be able to perform every task that is part of their role profile, you also need them to perform every delegated task that they agree to accept.

Sometimes, you'll delegate perfectly, the staff member will say that they agree to do it, and they still won't do it, and you have to face the 'dark side' of performance management – the implementation of consequences for poor performance.

Performance Management

Delegation
Training   Coaching
Development
Recognition   Reward
Recruitment
Mentoring

Consequences
Disciplinaries
Warnings
Disputes
Grievances
Dismissal

However, there is really only one reason that you'll need to engage in the disciplinary process – because you did not give feedback earlier. Remember, increase the frequency of feedback to make small course corrections. If someone is a long way from where they should be, what is missing?

The best time to solve a problem is always before it happens...

3.2 Roles versus people

It's important to see your team as a group of roles rather than as a group of people. This doesn't mean treating them as robots, it means that the role has to be defined first, and that has to define the right person to fulfil that role.

Let's say that there are three components to every business:

<p style="text-align:center;">People – Place – Program</p>

People: The staff, the people who operate the business from day to day

Place: The physical environment together with its culture and rules

Program: What the business actually does, its products, services and processes

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3.2.1 People, Place, Program

If you were planning to start a new business, which area would you define and develop first; people, place or program?

Why?

3.2.2 Building a team

Imagine that your role, your function and your entire team do not exist, and BACP has previously outsourced these activities on an ad hoc basis. You have been recruited to create a new team to fulfil this function. How would you build a team? What are the steps you would follow?

3.2.3 Moving a team

Imagine that your role, your function and your entire team are being moved into a different part of the business. You are taking on extra responsibilities, and you will need to redefine role profiles and restructure existing roles. How would you do this? What challenges would you anticipate?

If you focus on the role...	If you focus on the people...
You will focus on aligning responsibilities in order to cover everything that you are responsible for delivering	You will focus on aligning individuals, with all of their individual quirks, interests, likes and dislikes
You will organise activities based on those responsibilities	You will organise activities based on what individuals like, dislike or are good at
You will find impartial objective setting and performance management easy	You will become emotionally attached to objectives and performance management
You will treat your team fairly and equally	You will become biased
You will have a more efficient, engaged, happy team requiring less management intervention	You will create a disengaged team requiring more management intervention from you

People: If you start with the people, you become tied to those individuals. If they were to withdraw their effort, or leave the business, they would take all of their know-how, relationships and abilities with them. Many start-up businesses fail when the founders are in conflict and one of them takes their knowledge and relationships away. Apple almost disappeared when Steve Jobs was fired by the board. Most small businesses are driven solely by the energy of the owner, and without that, there is no business.

Program: If you start with the program, the 'what', you are tied to that, making it difficult for you to adapt to changing market conditions. When there is no longer demand for your products and services, you no longer have a business. Kodak, Nokia and Blockbuster were all tied to a program.

Place: If you start with the physical and cultural environment, you create a set of systemic rules which define the outcomes for people and program, and the way of getting there. Apple and Google started with place, and Microsoft have transformed their business in the same way. This enables them to evolve and grow beyond their original 'what'.

When you build the right **place**, you will attract the right **people** who will run the right **program**.

3.3 Know your team

To plan effectively, you must know your team well, and you must minimise barriers between them, because barriers leave gaps.

> ### 3.3.1 Getting to know each other
>
> Take a card and write a true fact about yourself that no-one else in the room knows.
>
> Make it something interesting, such as a hobby, an embarrassing moment, the time you met the Queen or similar.
>
> Put nothing on the card that would directly identify you.
>
> We'll then stick the cards on the wall and take a look at them all.
>
> Can we work out which facts belong to which people?

Do exercises like this really help you get to know each other?

Or do you only share what you feel safe to share?

Perhaps a more reliable way to get to know the members of your team is to assess them, not on what they're *like*, not on what they *say* they can do but on what they *demonstrate* that they can do.

You can see that this dovetails nicely into assessing standards based on objective, external measurements.

3.3.2 SWOT

A SWOT analysis is a very common business planning tool that is used to evaluate a company or person. It allows you to assess potential performance

An important point to remember is that Strengths don't always present Opportunities, and Weaknesses aren't always Threats. For example, you might have a member of staff who can be trusted to work from her own initiative for long periods of time, but a Threat is that she can become bossy if left to her own devices for too long, without feedback and guidance.

Strength	Useful skills or qualities that give the person an advantage or benefit
Weakness	Deficient skills or qualities which create a disadvantage
Opportunity	Activities or situations which can develop Strengths or potential for growth
Threat	Activities or situations in which Weaknesses will cause specific problems

3.3.3 Personal SWOT analysis

Who in the room knows you best? Get them to help you complete a personal SWOT analysis.

Strength
Weakness
Opportunity
Threat

3.4 Competency matrix

SWOT is a good start, but it doesn't allow you to see which of your staff are able to take on which responsibilities, so for that we need something more complex – the competency matrix.

A competency is a proven ability to perform a particular type of task to a specified standard.

A competency matrix is simply a table that shows three things:

Who can perform which **tasks** to what **standard**

Here's an example, showing different ways to record this information:

			Independence	Standard
5	Works to a high standard with no supervision			
4	Works to an acceptable standard with no supervision			
3	Works to a high standard with regular supervision	High	3	C
2	Works to an acceptable standard with regular supervision	Acceptable	2	B
1	Able to complete the task only under close supervision	Low	1	A

Name \ Skill	Write press releases	Server backups	Process expenses claims	Membership renewal	Moderate Facebook group	Organise board meeting
Alan	5	4	2	2	5	1
Brenda	3	2	4	5	3	2
Colin	3C	3C	1B	1A	2B	3B
Diane	2B	1B	2B	2C	3B	3C

Name \ Skill	Writing press releases	Server backups	Processing expenses claims	Membership renewal	Moderate Facebook group	Organise board meeting
Alan	▨▨▨▨	▨▨□□	□□□□	□□□□	▨▨▨▨	▨□□□
Diane	▨▨□□	▨□□□	▨▨□□	▨▨□□	▨▨▨□	▨▨▨□

3.4.1 The Value of Competency Data

A competency matrix allows you to record objective information about your team's capabilities.

- Why is this valuable?

- How would you be able to use it?

- What are the downsides?

- How would you compensate for them?

Discuss in your team and we'll compile a list.

Many companies use a Competency Framework to identify the key skills for each job description and enable managers to more objectively assess staff to common standards. This is easier to do with clearly defined roles with routine tasks, however it's possible for any role.

What other ways are there of organising this information?

- You could combine Standard and Independence into a single measure

- You could have a matrix for each person

- You could have a matrix for each task

However you choose to organise this data, it's important that it gives you what you need for effective resource planning in your team:

- **Develop staff based on objective, fair competency assessments**

- **Recruit staff based on performance gaps instead of who you like**

## 3.5 The importance of long term planning

We are goal directed animals. We think about what we want before we take action to get it.

When you wake up in the morning, you think about what to do today. When you go the shops, you think about what you need to buy.

How many times a week do you buy bread or milk? For how many years have you been buying those kinds of items? What have you achieved?

Is that how you want to feel about your work activities? Another report, another finance spreadsheet, another software installation, another event, another new member, another complaint, another press release, another year?

Therefore, if you're going to set yourself goals anyway, why not make them count for something worthwhile?

Take you to new heights
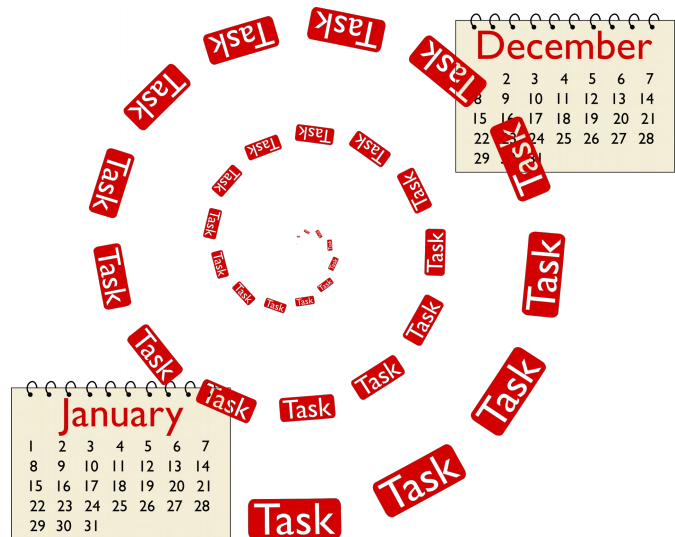
Having a long term plan means that....

Day to day, routine tasks...

Having a long term plan therefore achieves two important things for you:

1. Influences your short term goals so that you achieve more over time

2. Reduces pressure by preparing for how you'll deal with unexpected events

Remember, pressure is not a good thing for a manager because, whatever your management style, it pushes you to an extreme position, and you'll change from this:

Under pressure, you are more likely to:

Compromise on your standards	›	Take on tasks that you could have delegated	›	Alienate your team	›	Become isolated	›	Suffer stress related illnesses

Without pressure, you are more likely to:

Maintain your standards	›	Delegate effectively	›	Encourage your team	›	Become productive	›	Enjoy success related rewards

As a manager, you are not running a sole trader business. You must execute your responsibilities through your team. Therefore, instead of planning goals for your own day, you now have to plan goals for your team's day, and that's really what resource planning is all about.

If that information is all in your head then your team is still dependent on you to tell them where to be and what to do, and you can't step back from the day to day running of the team.

3.6 Time management

Time management is a very common phrase, yet it is a little misleading because you cannot change the amount of time available, all you can do is manage what you do with that time.

Therefore, when we talk about 'time management' what we're really talking about is task management, or the management of priorities.

3.6.1 Flexible or Constant?

If I see tasks as a constant and time as flexible, then...	
If I see time as a constant and tasks as flexible, then...	
If I see tasks and time as constant and resources as flexible, then...	

People who are not good time managers, who are often late for meetings and 'double book' themselves, who often seem to be in a rush, think that the number of things they have to do in a day is constant and time is variable. They think that they can steal a little time here and there, and that popping to the bank or checking their emails "only takes a minute".

Good time managers know that those tasks don't take a minute, they take half an hour. They know that time is a constant, and to have a productive day they need to keep on reassessing their priorities.

If someone gives you a task or objective, you cannot really take on the responsibility for it until you know what is involved. It would be like buying a car without first checking its condition, running costs and so on. You wouldn't know what you were letting yourself in for, yet this is exactly what people do.

After module 1, you put into practice your delegation skills and discovered that, sometimes, you don't get the results that you expect. One reason for this is that the task you delegated is not possible given the time or level of experience required. When you think about managing your own time, all the same good practice applies to delegation too.

Prioritising tasks means that you think about two different factors: Importance and Urgency:

- I need to stop and get some bread on the way home. It's important, but I don't need to do it until later on today, so it's not urgent.

- I need to finish a report before I leave the office tonight. It's important, and it's urgent.

- I need to contribute a HR suggestion by lunchtime today. It's urgent, but not important.

3.7 Shrinking time

In the last century, the working day for most people could be as long as 16 hours a day, 6 days a week. Robert Owen campaigned for shorter working hours and advocated "Eight hours labour, eight hours recreation, eight hours rest". This didn't start to become reality in the UK until the 1920s, and in some countries this still isn't the case.

Of course, as workers reduced their working hours, factory owners needed more workers to produce the same output. Their labour costs increased, and in some cases, doubled. This was balanced against increased productivity, due to better working conditions and health.

Today in the UK, the majority of people work in service businesses, where productivity might be measured in the number of phone calls answered or the number of cars sold, rather than the number of biscuit tins manufactured.

Where people work in jobs that are not so clearly defined, time management becomes a major problem, with employees tending to stretch their working hours, or skip lunch in order to finish tasks.

This has created the new problem of presenteeism – people who are in work, but shouldn't be.

If you were to work 5 days a week then you are devoting around 40 hours every week to your work responsibilities. Assuming that you feel that every one of those hours is fully occupied:

Imagine that, for some unavoidable reason, you had to do your current job in 4 days per week. What would you do differently?

Imagine that, for some unavoidable reason, you had to do your current job in 1 day per week. What would you do differently?

Imagine that, for some unavoidable reason, you had to do your current job in 1 hour per week. What would you do differently?

Imagine that, for some unavoidable reason, you had to do your current job in 1 minute per week. What would you do differently?

3.7.1 Important Versus Urgent

Assess these tasks as **H**igh, **M**edium or **L**ow in terms of their Importance and Urgency, based on your own personal interpretation of the task.

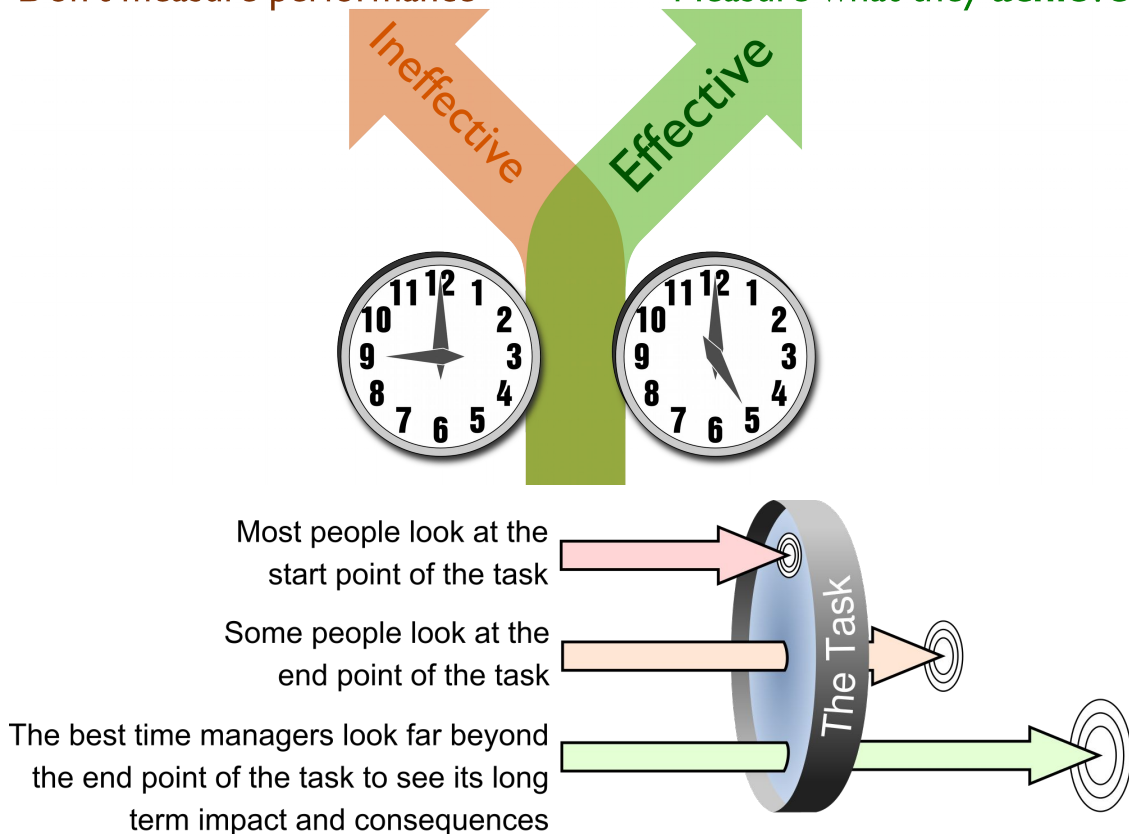| Task	Importance	Urgency
Finish a management report, due at 5:00 today		
Get your partner a birthday present (their birthday is today)		
Organise software training for your team		
Prepare for tomorrow's team meeting		
Have lunch with a friend at 1:00 today		
Prepare for your next round of Coaching Conversations		
Start induction training for a new member of your team		

3.8 Plan with the end in mind

People who are effective at managing how they allocate their time have a very simple difference in their approach to people who always seem to be rushing from one thing to the next, and who never quite get everything done.

On top of this, people who are effective at prioritising have a very simple difference in their focus to people who waste time on activities which turn out to have been unnecessary.

Plan for the **START** of tasks
Focus on being **busy**
Don't measure performance

Plan for the **END** of tasks
Focus on being **productive**
Measure what they **achieve**

Ineffective

Effective

Most people look at the start point of the task

Some people look at the end point of the task

The best time managers look far beyond the end point of the task to see its long term impact and consequences

The Task

3.9 Team meetings

What is the purpose of a team meeting?

How do you currently run a meeting?

What is typically on the agenda?

3.9.1 Plan a team meeting

Work in small groups to plan a general purpose team meeting format, using these questions to guide you:

1. What is the purpose of the meeting?

2. Who does the meeting serve?

3. What is the duration of the meeting

4. How can you plan the meeting in reverse?

5. How is that useful?

3.10 Project management principles

Here are some simple project management principles which you can apply to any complex task:

- Plan in reverse, so start with the outcome and final completion date

- Break the task down into a smaller series of steps, working backwards in time from your ideal endpoint

- Focus on delivering one step at a time

- Set realistic completion times for each step

- Be realistic about risks and possible delays and create contingency plans

- When delegating steps, don't pad your delivery times to allow for late delivery – this lets people know that you're not serious about deadlines

- Build regular checkpoints so that if a delegated task is delayed you can take action

- If multiple people are involved, regularly let them know what's happening, even when nothing is happening. Communicate to a schedule, not on demand.

- If your project timescale is more than a few weeks, check that it is still relevant by asking yourself, "Am I doing this because it's right, or am I doing it because I'm doing it?"

- When you reach your endpoint, reflect on what happened, why, and what you can improve

Complex projects usually have a project plan, with a detailed description of deliverables, risks, accountabilities and timescales.

Exactly the same principles apply, whether you're running a large and complex project, or developing a plan for your team, or planning your summer holiday.

Start with the end in mind – for example, when you're thinking about what to pack for your holiday, don't look ahead and think about what you might need, imagine yourself on holiday, walk through the days and activities and make a list, looking back, of what you needed.

3.11 Summary

3.11.1 Conclusions

We'll split the group into two teams.

You have 30 minutes to put together a 10 minute (maximum) presentation. Use this extra time to discuss points 2 and 3 in your group before getting into your design work.

Your presentation should include:

1. An ouline of how you used the time and project management concepts and anything else you've learned during the MDP to plan your presentation

2. A SWOT analysis of BACP and what this means for BACP's managers

3. Your plans for developing your management skills both in the long term, and also between now and the next module in September

Following your presentation, the other team will give you objective feedback

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

Maximum 25 points – Demonstration of feedback principles from module 2

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

3.12 Assignment

We're now at the half way point of the Management Development Program and we're taking a break over the summer, so it's a good time to pause and reflect.

Delegation and performance management are not 'tick box' exercises that you tried once just so that you could write an assignment. They are the critical working practices of an effective manager. The program and the assignments helped you to get started, and it's up to you to implement the principles every day and to refine your practice through experience.

Your assignment is simply to write a 600-ish word reflection on the following:

Last month, you created a way of measuring your performance, and therefore your development, as a manager. The world is not short of technicians, but managers who can organise and deliver complex results through teams are much more difficult to find. Your development as a manager is therefore a vital part of your long term career plan.

- Give a brief outline of your long term career plan and identify your focus areas in developing yourself as a manager to achieve that.

- What was your personal metric, and how does that help you to achieve your long term aims?

- What have you continued to discover as you have developed your skills for delegating and managing performance?

- What impact has this had on your team and the wider business?

- What is the most important outcome that you would now like to achieve for yourself as a result of this development program?

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