



Management Development Program

Module 5 Metrics, Feedback and Strategy

Contents

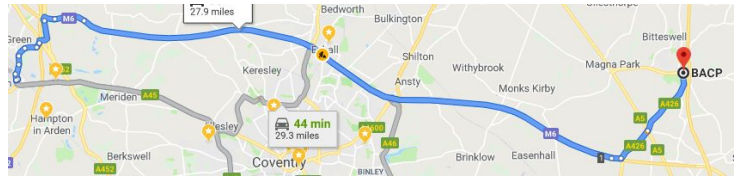
Module 5 Metrics, Feedback and Strategy.....	1
5.1 Strategy.....	3
5.2 BACP Strategy.....	4
5.3 Charitable Objectives.....	5
5.3.1 Translating strategy.....	5
5.4 Values.....	6
5.4.1 Values.....	6
5.5 Where Are We?.....	7
5.5.1 Simple metrics.....	8
5.6 Risk.....	9
5.7 Managing Conflict.....	10
5.7.1 World View.....	12
5.7.2 World View Results.....	14
5.8 Conflict Styles.....	15
5.9 Conflict Cultures.....	16
5.9.1 Conflict Cultures.....	16
5.9.2 Straw Tower.....	17
5.9.3 Reflection.....	18
5.10 Driving Growth.....	19
5.10.1 Adding Value.....	20
5.10.2 Business growth.....	21
5.10.3 Business Growth – Analysis.....	22
5.11 Summary.....	23
5.11.1 Conclusions.....	23
5.12 Assignment.....	24
Part 1 – Strategy.....	24
Part 2 – Conflict.....	24

5.1 Strategy

What is a strategy?

Simply, a strategy is a plan. In order to make any plan, you need to know three things:

1. Where you are
2. Where you're going
3. How you intend to get there



It sounds simple, yet there are many risks lurking in the details.

Where are you?

Without accurate and honest measurements, you don't know where you are, and you're more likely to base your strategy on where you think you should be, rather than where you actually are.



Where are you going?

Without a clear direction, you're more likely to react to the conflicting demands of your customers and competitors, and you'll end up going round in circles.

How will you get there?

The future is always uncertain, and as soon as you begin to take action on your plan, the landscape will change. If you don't continually update your plan, you'll be stuck with a course of action which is no longer relevant.



5.2 BACP Strategy

Our strategy, launched in spring 2016, was put into place after careful consideration of the above objectives, and the Charity Commission's guidance on public benefit.

Because we know that counselling changes lives, we will:

1. promote expertise in the counselling professions to enable confidence in BACP and its members
 2. use our resources efficiently and effectively to fulfil our internal and external strategic objectives to maximise impact
 3. be alert to change and encourage innovation in a fast moving world, ensuring our policy and interventions are informed and evidence based
 4. commission, undertake and encourage research and relationships to ensure that we can champion best practice in the counselling professions
 5. uphold the highest standards of differentiated practice, ensuring that our standards are fit for purpose and communicable to clients and commissioners
 6. educate the public about the practice and benefits of the counselling professions and learn from people how to develop responsive services
 7. position the profession in the minds of commissioners and employers, to argue the case for best practice and promote the benefits of the counselling professions
 8. develop relationships with the wider professions and all our stakeholders
 9. define the scope and standards of training and practice for the counselling professions, drawing on evidence and experience, reflected in differentiated membership categories
 10. commit to the highest standards of customer service, public engagement and membership engagement
-

5.3 Charitable Objectives

Our charitable objectives are:

- to promote and provide education and training for counsellors and psychotherapists working in either professional or voluntary settings, whether full or part time, with a view to raising the standards of the counselling professions for the benefit of the community and in particular for those who are the recipients of counselling or psychotherapy
- to inform and educate the public about the contribution that the counselling professions can make generally and particularly in meeting the needs of those whose participation and development in society is impaired by physical or psychological health needs or disability.

5.3.1 Translating strategy

What do these strategy points mean for you and your team?

1. promote expertise...
2. use resources efficiently...
3. be alert to change...
4. research and relationships...
5. standards of practice...
6. educate the public...
7. position the profession...
8. develop relationships...
9. standards of training...
10. standards of customer service...

5.4 Values

While we're looking at BACP's strategy, we might also look at the new organisational values.

A value is a principle that guides our thinking and behaviour.

Another way of looking at a value is "something that is important". Instead of thinking about what your values *should* be, you can look at what people focus on right now, what people spend most of their time doing. That reveals what's really important, what the true priorities are.

- Responsibility - we take responsibility for all our actions and do the right thing, feeling safe to admit our mistakes
- Encouragement - we encourage ideas for continuous improvement, being open to change and challenges
- Support - we value each other and our diversity, promoting inclusiveness and tolerance
- Passion - our work will reflect our passion for counselling changing lives
- Excellence - we strive for the highest standards
- Collaboration - we work together for the best outcomes: communicating, listening, learning and sharing ideas
- Trust - we have integrity, building and maintaining trust, openness, honesty and fairness

One of the project teams is working on ways to embed these values into organisational behaviour.

5.4.1 Values

How can values be measured?

How should values be policed?

Do these values support what you feel are your priorities?

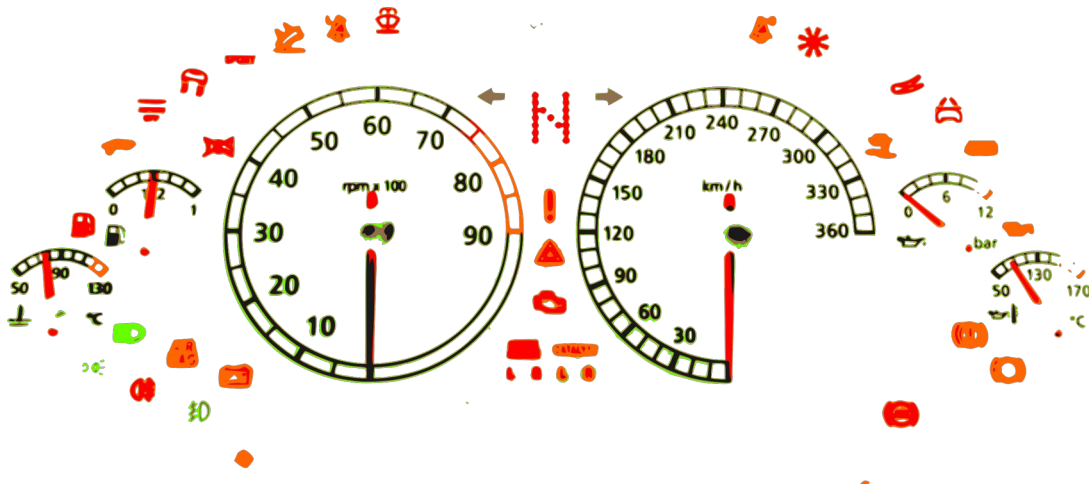
5.5 Where Are We?

How do you know that you are doing the right things, are that you are in the right place?

Without accurate measures, you don't know if you are in the right place, heading in the right direction. As you have already discovered in this program, with measurement, there is no feedback. Without measurement and feedback, you cannot navigate accurately.

Think of a car. Your car gives you status information – fuel remaining and speed. You only see a warning light when your car has something important to tell you. Your sat-nav gives you some additional information – direction and route.

Your car's dashboard is designed to give you the right information with the minimum of distraction. Measuring everything that your car is doing would be overwhelming.



You need to measure enough to know you're on course without measuring so much that you are lost in data.

But how do you work out the right things to measure?

One way is to look at the simple influencing factors which summarise many other activities.

Let's consider membership figures as a potential metric.

It is not enough to know how many members BACP has. We need to know *why* BACP has members. We need to know under what conditions BACP gains and loses members.

We might therefore measure how membership numbers change over time.

What does it cost to acquire a new member? Think in terms of marketing, administration, and any other costs which might be incurred.

What does it cost to keep a member? Are there outgoing costs? If you send a renewal letter, what is the cost of that?

As you can see, counting members does not provide enough information. It is a snapshot of the current position, but it gives no indication of BACP's potential direction.

Now let's consider the context for that information. Who are BACP's members? Is the number of potential members increasing or decreasing? Is the market getting bigger or smaller? How does BACP's membership level compare to that of its competitors? How many enquiries turn into memberships?

Finally, we need to understand your objective, both for BACP and for your own team. Do you want more members? Or to maintain the current level? Or to change the type of members that BACP attracts?

5.5.1 Simple metrics

If you can't measure something then you can't improve it.

What are the three most important measures for improving your team's performance?

1:

2:

3:

Work in pairs and take it in turns to challenge your partner's choice of metrics. Question how these metrics are relevant, how they demonstrate the right activities, and how they support improvement.

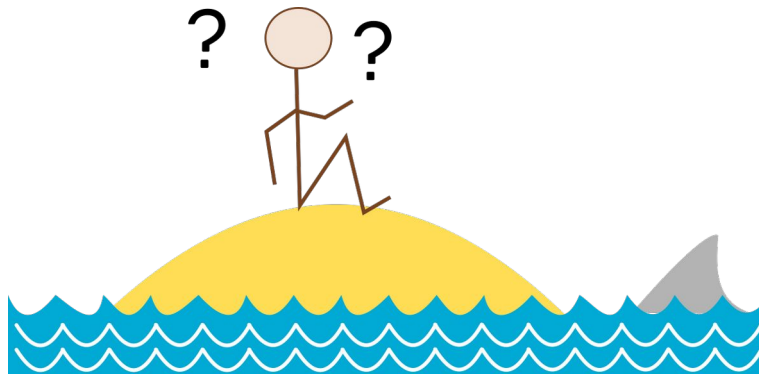
Which points in the BACP strategy do these metrics connect with?

5.6 Risk

Having a strategy means that you're making a guess about the future. It can't be a perfect guess, but you hope it's better than reacting to changing circumstances. You may not reach the exact destination you had in mind, but it's better to have a sense of your own direction rather than to drift.

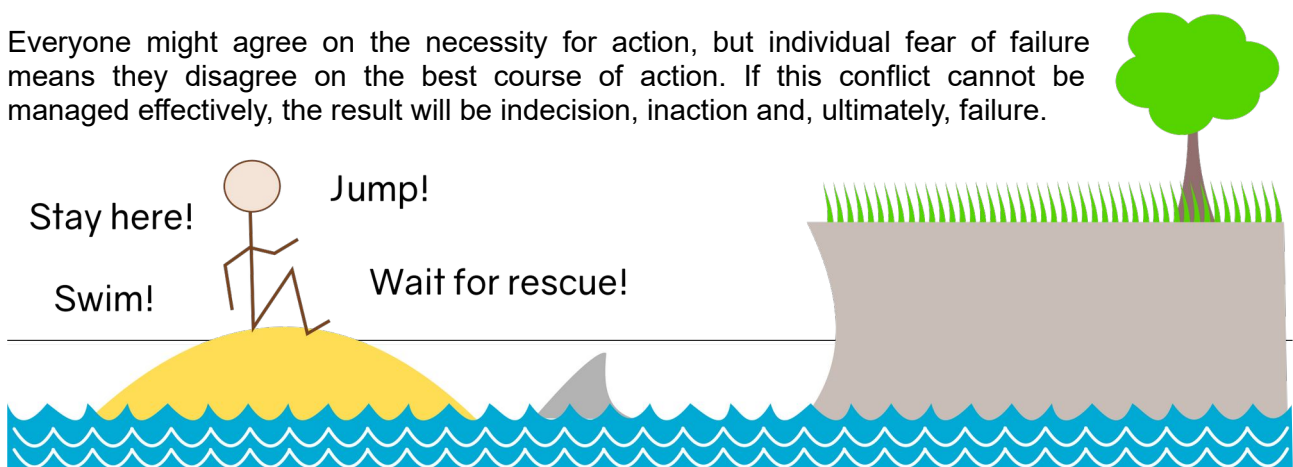
Unfortunately, as soon as you create a strategy, you create conflict.

You can't stay where you are, because you are standing on an island. That island is continually shrinking, because the market is moving, your customers' expectations are changing, and your competitors are innovating and evolving. Staying where you are means you're going backwards.



As soon as you make a plan to move, you introduce uncertainty. When people are in an uncertain, unpredictable environment, they feel unsafe and insecure. Everyone might agree that moving is the best option, but how to move, and when, and to where?

Everyone might agree on the necessity for action, but individual fear of failure means they disagree on the best course of action. If this conflict cannot be managed effectively, the result will be indecision, inaction and, ultimately, failure.



5.7 Managing Conflict

Conflict is part of daily life, and for the most part we manage it well, for example when two people want to take the same day off, or when two people in a supermarket want to get their trolleys down the same aisle, or even when two drivers see the same parking space.

Some people see conflict as a battle which can only be won or lost, others see it as a situation to be resolved and more easily see the other person's point of view.

Some psychologists believe that this difference in how people deal with conflict arises from a simple difference in their view of the world, which began very early on in their lives.

Some people believe that there's enough of everything for everyone, and all that's needed to get through life is a little patience.

Other people believe that there's not enough of everything to go round, so if you don't fight for what you need, you might lose out.

The basic difference is that people who had every need attended to as a baby grow up knowing that the world, and other people, will satisfy their needs, so it's safe to rely on other people. On the other hand, people who didn't have every need satisfied as a baby grow up knowing that if you want something, you have to get it for yourself and you can't rely totally on other people, especially where your livelihood or safety are concerned.

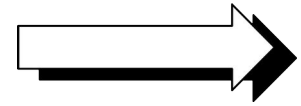
It's not a matter of which is best, as there are pros and cons to each type. As with anything in life, flexibility always wins.

Which type you mostly lean towards affects not only how you get involved in conflict, but also how you deal with conflict between other people. For example, how you deal with an angry customer is influenced by how you feel about conflict, even though you're not directly involved in it.

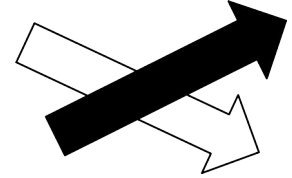
Beliefs - Conflict can arise because two or more people have different beliefs about the world. Whilst beliefs aren't universally true, people act as if they are and will go to great lengths to defend them.

Black **White**

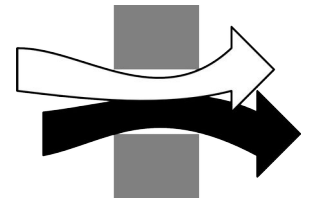
Intention - Even in the same situation, different people can have very different intentions or agendas. Sometimes, one or more people will have a 'hidden agenda', which leads to conflict because, while both people say they want the same thing, in fact they don't.



Goal - People can experience conflict because they have very different goals. Normally, this wouldn't cause a problem, but when something connects those people, such as a sense of competition, those different goals create conflict.



Resources - Conflict can arise because two or more people have to compete for limited resources. Both have a goal to achieve, but for one to achieve their goal would be at the other's expense. Conflict over resources is often strongest when the people involved are aiming for the same goal.



5.7.1 World View

For **each** question, mark the answer which seems more like your natural response.

		A	B
1	You are at home by yourself when two friends drop in. You offer them a cup of tea and some cake, but you then find that there are only two french fries left.	Pretend you don't have any cakes left.	Give the last two cakes to your friends.
2	You and your partner want to watch different TV channels at the same time and you only have one TV.	Negotiate, bargain, trade or fight to see who wins.	Let your partner watch what they want, after all it's only TV.
3	A promotion becomes available that you are very interested in, and you know that one of your colleagues will also apply who you can see would be an excellent choice for the role.	See your colleague as a threat and do everything that you can to influence the decision maker or make your competitor look incompetent.	Put your application in and trust the process to select the best person.
4	Your colleague is chosen for the job mentioned above.	Resent the decision maker and set out to prove that they made the wrong choice.	Try to understand the decision maker's point of view and use it as a learning experience for next time.
5	A friend calls who you haven't heard from in years.	You wonder what they want.	You are pleased to catch up with them.
6	Good things come...	To those who go out and get them.	To those who wait.

7	When life gets difficult...	I find the strength to fight on.	Something good will turn up.
8	Growing up, I had to...	Fight to get what I wanted.	Take care of my friends and family.
9	As a child, I...	Felt that something was missing.	Had everything that I needed.
10	As a child, my family were...	Competitive.	Supportive.
11	When someone lets me down...	I learn not to trust them again.	I give them a second chance - everyone deserves one.
12	If I won a million on the lottery...	I'd watch out for the spongers and beggars and 'friends' I haven't heard from in years.	I'd think about how to divide it between myself, my family and my friends so that we could all enjoy it.
13	In the January sales...	I fight to get to the front because there are only so many bargains.	I let other people push to the front because I know they'll miss the real bargains that come out later.
14	On a long journey...	I keep wondering, "Are we there yet?"	I take a chance to enjoy the scenery.
15	On Christmas morning, I...	Can't wait to see what presents I've got.	Can't wait to see my family's faces when they open their presents.
16	This quiz was...	Time consuming.	Thought provoking.
	Total:		

5.7.2 World View Results

Count how many A and B answers you gave and colour a square from the left for each A, like this example for 4 As:



--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

The more filled squares on the scale, the more you tend to compete.

The more white squares on the scale, the more you tend to accommodate.

	More filled:	More white:
If, as a child, your needs were mostly met by	Yourself	Others
Your dominant tendency is to	Compete	Accommodate
You tend to trust others	Less	More
You tend to rely on others	Less	More
Under pressure, you tend to	Blame others	Blame yourself
Under pressure, you might even become	Isolated	Needy
You tend to see resources as	Limited	Abundant
You tend to believe	Yourself	Others
You tend to value	Initiative and drive	Teamwork and harmony

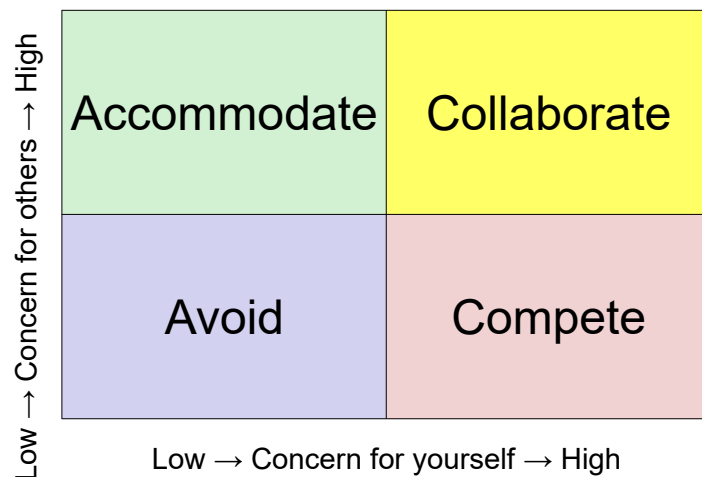
Because these traits have influenced you since the first few weeks of your life, you generally have no idea that they exist, they are the window through which you see the world. The only time that you really notice your personality is when it differs from someone else's, and the resulting conflict lets you know that you have different views of the world.

We all believe that our view of the world is the one that is innately correct, sensible, reasonable and normal. We are drawn to people who are 'like minded' because this minimises conflict, and we try to convert others to our own way of thinking, either directly, or indirectly through our expectations and reactions.

How we manage those differences determines how we deal with conflict.

5.8 Conflict Styles

One theory of conflict resolution shows two competing needs; a need to look after your own interests, and a need to serve the interests of others. How strongly you feel these needs is reflected in how you deal with conflict.

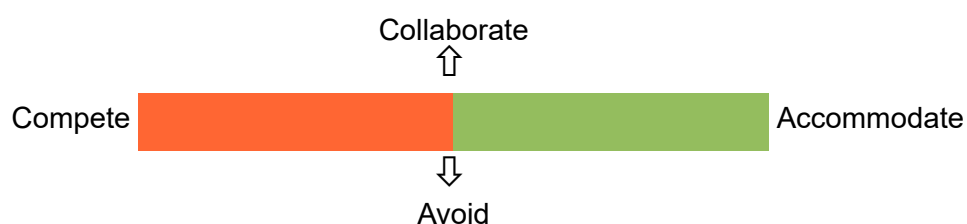


Avoid	Runs away at the first sign of conflict and hopes someone else will deal with it.
Accommodate	Gives in to the other person and may rationalise that as kindness.
Compete	Fights to win. May even create conflict in order to win, or may feel that they haven't really won if they haven't had to fight for it.
Collaborate	Looks for 'win/win' opportunities. Makes the discussion bigger so that everyone can achieve a good outcome.

The ideal situation is that you care about what you want, and you care about what the other person wants, so you look for opportunities to Collaborate in order to resolve conflict.

The worst situation is to Avoid conflict, because you know it will only get worse if you leave it.

At least with Compete and Accommodate, someone gets what they want.



5.9 Conflict Cultures

Can you see the ways in which organisational cultures reflect these conflict styles?

“The customer is always right” = Accommodate?

“You made a mistake, but we’ll give you a refund as a gesture of goodwill” = Compete?

“Oh, we’d never have done that, it’s not our policy” = Avoid?

“We can see there’s been a problem, let’s work together to resolve it” = Collaborate?

Your customers don’t notice when you do everything right, because that’s what they expect.

Your customers only notice when something goes wrong, and by going out of your way to handle that as well as you can, you’ll turn customers into fans.

5.9.1 Conflict Cultures

What would you say is the conflict style within the BACP culture?

Is this the same as your personal conflict style?

What effect does that have?

5.9.2 Straw Tower

You have 20 minutes to build the tallest straw tower. As you might by now expect, the winning team gets a prize, and there are some rules.

1. Your tower must be free standing, not connected to any walls, ceiling, furniture or people
 2. Your tower must stand under its own strength with no assistance for one minute
 3. The base of your tower must be on the meeting room floor
 4. You have 2 minutes planning time, which has already started, during which you can talk with your other team mates
 5. At the end of your planning time, you may buy your materials
 6. You may only use the materials provided
 7. You have £1.50 to spend on materials. One straw costs 1p, and one roll of tape costs 20p
 8. Write down the materials you wish to buy to prevent the other team knowing your strategy, and submit your 'order form' to the 'supplier' at the end of your planning time
 9. The building time will then start when your materials are supplied, and will end after 20 minutes
 - 10. During the building time, you may not communicate with anyone else in the room, which means no talking, no written notes, no mime, no sign language**
 11. Once the building time starts you may not buy any more materials
 12. The winning tower will be judged by its height in centimetres multiplied by the amount of money in pennies that your team has left over e.g. if your tower is 1m high and you have 10p left over, your score will be 1000.
-

5.9.3 Reflection

In your team, discuss your experience of the straw tower exercise.

Which aspects of the exercise were most challenging for you?

What effect did the absence of communication have?

What does this show you about strategy and feedback?

What did you learn about conflict?

What would you do differently if you were to do this exercise again?

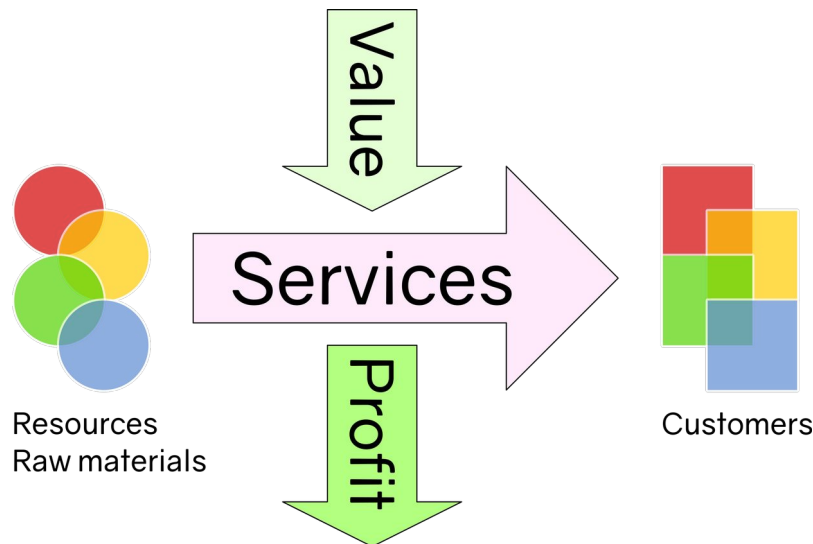
How does this apply to your role as a manager?

5.10 Driving Growth

As you have seen, achieving growth and success is complex. You have to balance many factors, and sometimes, what seems like a good idea has unintended consequences because of the complex effects on the interconnected parts of a system.

In order to grow any business, we have to understand what the business model is.

Quite simply, a business exists to take raw materials, add something that is of value to customers and then use that added value to generate profit:



In order to increase the amount of profit that we generate, we could:

- Increase the value that we add
- Increase the number of customers
- Increase average customer spend
- Reduce operating costs

As a professional association, BACP has to justify charging members more than the cost of the services provided. This cost difference is BACP's 'added value' which might include:

1. Professional affiliation, status and recognition
2. Access to continuing education and development programs not available elsewhere
3. Access to tools, standards and knowledge resources
4. Access to discounted services such as insurance
5. A platform for cooperation and networking
6. Advocacy on market development, including political lobbying

BACP's membership fee could be seen as:

- A levy charged through to end users to fund consumer protection
- A subscription for membership services
- A market access fee
- A fee to access co-operative marketing activities

5.10.1 Adding Value

What do you think is the value that BACP adds to the services provided to members and the consumers of services? Discuss the possibilities with your colleagues and make some notes here.

5.10.2 Business growth

In two teams, come up with some ideas in each of these four areas and write them on your flipchart sheet. You can also make a note here of any that you want to work on with your own team.

Remember that 'customer' could cover both the BACP member and the end user of the member's services.

Aim to make these new ideas, rather than existing activities.

Also aim to be creative. Don't think about whether the ideas will 'work' or not.

Increase the value that we add	Increase the number of customers
Increase customer spend	Reduce operating costs

5.10.3 Business Growth – Analysis

Take the piece of flipchart paper from the other team.

Think about the ideas that they've come up with.

What do you think each one could generate in terms of additional added value? This could be increased revenue, or decreased costs, or time savings, or something else that you can measure.

Write a figure for each one in the right hand column.

Some ideas seem obvious, but you may find that they deliver relatively low measurable benefit. Others may lead to better returns. How can you estimate this?

Increase the value that we add		Increase the number of customers	
Increase customer spend		Reduce operating costs	

5.11 Summary

5.11.1 Conclusions

We'll split the group into two teams.

You have 20 minutes to put together a 10 minute (maximum) presentation.

Do take note of the scoring criteria.

Your presentation should include:

1. Choose one of the points of the BACP strategy.
2. How could managers demonstrate that they are contributing towards it?
3. What metric could be associated with that strategy point?
4. What actions could contribute to it?
5. What are the risks associated with the BACP strategy?
6. What conflict could arise from that risk?

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 effective use of feedback

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

5.12 Assignment

Strategy can be a complex issue, because there is no single way to achieve your business objectives. Metrics help you to focus on the right short term activities, and feedback helps you to co-ordinate those activities.

Your assignment is simply to write a 600-ish word response to the following questions:

Part 1 – Strategy

Discuss the BACP strategy with your team.

1. How do they see their part in achieving BACP's objectives
2. What do you learn from this?

Part 2 – Conflict

1. What conflict do you see in your own team?
2. What causes the conflict? Limited resources, unclear objectives, or something else?
3. How can you focus this conflict in a productive way to enable change?

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

Next month, we will be working on presentation skills. Please think of some simple subjects that you can easily talk about for 1 or 2 minutes.
