

**What is a manager?** *Someone who helps people work together*

**What is a leader?** *Someone who inspires people to take a risk*

**They're *not* different people.** Managers must have leadership ability and *vice versa*. A *supervisor* is just a synonym for manager; *supervision* is part of management (Quadrant III, below). A *generalist* works cross-functionally.

## What do you need to know to be a manager?

The Model is flexible: managers at each level and in all sectors and size organizations use it. Its Self-Assessment establishes one's starting point and development options.

### I. Best Practices

Refer to *The Index* for the next levels.  
 Generalists must be familiar with all these.

- 1.0 Structure
- 2.0 Marketing and sales
- 3.0 Operations
- 4.0 Information
- 5.0 Human resources
- 6.0 Finance

### II. Personal Development

Managing people requires maturity and a personal commitment to service.

- Handling managerial power
- Clarifying one's personal goals
- Managing one's time and tasks
- Improving decision-making abilities
- Developing career-long learning habits
- Cultivating peer support

### III. Supervision

Managers must welcome the psychological challenges of working with people.

- Maintaining ethical behavior
- Communicating and teaching
- Assembling a team or workforce
- Leading individuals and the group
- Working through conflict
- Delegating opportunities and resources

### IV. Organization Perspective

Executives must align their organization with market trends and external forces.

- Creating an inspiring cause and vision
- Assessing organizational risks
- Planning
- Creating a culture of collaboration
- Aligning with other organizations
- Advocating in the community

The Center for Management Terms & Practices trains people in **Standards-Based Management**, applying its ethical and technical standards through simple tools for meeting management, planning, process improvement, and project oversight. It gets everyone on the same page. [www.theindex.net](http://www.theindex.net) US (608) 260-9300

## What is a manager’s career path? Management as a calling

Becoming a manager takes a big change in attitude. The rewards become more indirect, but you get more opportunities to help people reach their full potential:

<b>Manager</b>	Now rewarded for <i>other’s</i> performance.
<b>Executive</b>	A manager of managers. Depends on data to direct activities.
<b>Chief executive</b>	Leads and manages everyone. Needs external help on sensitive issues.

## Why are managers valuable?

A 10% gain in management ability can increase margins 10%. Generalist managers improve Key Performance Indicators (KPIs) by fostering cross-functional collaboration: meeting a big challenge is impossible unless *everyone* in the organization is working together. Search “Lubar podcasts” in our blog ([www.theindex.net/blog](http://www.theindex.net/blog)) for interviews on:

- Sales Growth
- Productivity
- Quality
- Customer Satisfaction
- Retention
- Gross Margin

## What personal characteristics make real managers?

### **Maturity**

Working with people takes maturity, means having the emotional strength to deal calmly with co-workers’ quirks and upsets. It also means having the wisdom to see calmly into the practical reality of an emotional situation. Put differently, good managers are caring, curious, and courageous.

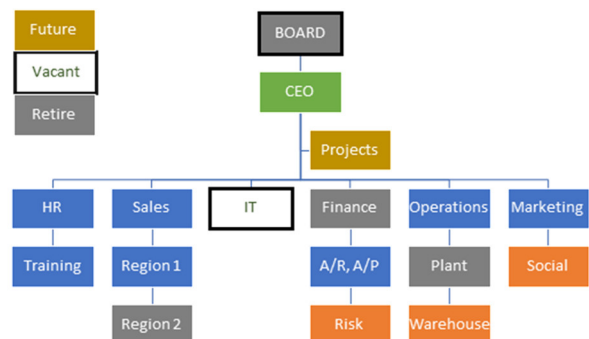
### **The moral use of power**

Managers have great power: a few careless words can make employees feel unsafe and unwanted. Distrust of their boss is the key reason employees make mistakes, underperform, and quit. The Model integrates the Pledge of Managerial Power.

## How is the Model valuable to an organization?

The Model makes it easier to decide who should be a manager—and who should stay in a technical role. Holding every manager and executive to the same standard makes everyone confident that promotions are fair and thoughtful.

Clarity of the manager’s job is also essential to a succession plan (chart) which keeps the organization safe and growing steadily. Using the same structure, terminology, and knowledge makes it much easier to share ideas and wisdom as mentors and peers.



Supervisor	
Date	

Refer to the Milwaukee Model of Leader Development™ and Chapter 6 of *Atoms & Orchestras*

**A manager is someone who helps people work together.** Being a manager demands different kinds of skills, knowledge, and great maturity. Even experienced executives can learn more about their industry, management practices, human dynamics—and themselves.

**Management is a calling.** Good bosses believe deeply that *their* success is measured by how they help *others* meet their goals. See Chapter 8.

**But people are complicated.** People are always changing, and they respond differently to change and stress, failure, and success. Behaviors also change when the group changes.

### Instructions

1. Manager and their boss discuss the Model
2. Manager assesses themselves (perhaps with guidance from The Center)
3. Manager and boss discuss the assessment and agree on what to learn that year
4. They choose development activities (ideas below) and active projects
5. They evaluate progress and adjust as needed
6. Toward the end of the year, they re-assess the manager’s performance

### Development activities

- Projects or new responsibilities
- Using tools from The GM Toolkit ([www.theindex.net](http://www.theindex.net))
- Reading and reflection
- Workshops
- Discussion in a mentor/protégé relationship
- Job rotation
- Participation in a peer workgroup

*Standards-Based Management provides consistency and fairness to manager development.*

Manager: \_\_\_\_\_

## I. Best practices

The standard knowledge base for general management terms and practices. For competent and creative meeting management, planning, process improvement, and project oversight.

See The Index at [www.theindex.net](http://www.theindex.net). Click through levels 1, 2, and 3 for definitions and context.

Self-rating scale: 1 to 4. 1=Area of focus. 4=Sufficiency for current role. X=Not yet relevant.

A "4" doesn't mean perfection. Rate yourself based on your position and organization—not as if you're CEO of General Motors.

	<u>Self-rating</u>
<b>1.0 Structure</b>	_____
<b>2.0 Marketing and sales</b>	_____
<b>3.0 Operations</b>	_____
<b>4.0 Information</b>	_____
<b>5.0 Human resources</b>	_____
<b>6.0 Finance</b>	_____

How do you like to learn? \_\_\_\_\_

Notes

*Development activities for the year (knowledge, skills, perspectives)*

% comp.


Manager: \_\_\_\_\_

## II. Personal Development

Managing people requires maturity and a personal commitment to service.

Self-rating scale: 1 to 4: 1=Area of focus. 4=Sufficiency for current role. X=Not relevant.

Self-rating

### Handling managerial power \_\_\_\_\_

Read the Pledge of Managerial Power (Chapter 4) to learn how much your power can help and hurt your staff. Knowing how to monitor and improve how you use your authority in different situations.

### Clarifying one's personal goals \_\_\_\_\_

Knowing what you want to achieve *and* who you want to be. Thinking objectively about your beliefs and attitudes. Able to put other people first, but also take care of your own physical and mental health.

### Managing one's time and tasks \_\_\_\_\_

Adapting how you use your time even as your responsibilities change. Having spare time every week to listen to your staff, reflect, plan, and deal with the inevitable surprises. Not over-committing.

### Improving decision-making abilities \_\_\_\_\_

Using different kinds of quantitative and qualitative information to help you and your staff make good decisions. Being aware of your own conscious and subconscious processes.

### Developing career-long learning habits \_\_\_\_\_

Having learning goals, healthy personal interests, and channels for finding facts. Seeking challenging perspectives. Even successful chief executives always have things to learn.

### Cultivating peer support (e.g., Center Workgroups) \_\_\_\_\_

Actively seeking peers for information, ideas, and moral support. Purposely seeking new acquaintances who will challenge your ideas, perspectives, and beliefs.

Notes

*Development activities for the year (knowledge, skills, perspectives)*

% comp.


### III. Supervision

Managers must welcome the moral, ethical, and psychological challenges of working with people.

Self-rating scale: 1 to 4. 1=Area of focus. 4=Sufficiency for current role. X=Not yet relevant.

Self-rating

**Maintaining ethical behavior in others** \_\_\_\_\_

Anticipating ethical dilemmas and leading those discussions. Responding to unethical behavior. Understanding the letter and spirit of your Values Statement and Code of Ethics.

**Communicating and teaching** \_\_\_\_\_

Asking great questions. Listening with comprehension, sympathy, and objectivity. Sharing ideas in writing, speaking, and images. Inspiring people by making the big goals vivid and exciting.

**Assembling a team or workforce** (tool: Management Self-Audit) \_\_\_\_\_

Knowing the mix of skills, experiences, time, and personalities when hiring or staffing a project or process. Knowing when to remove or reassign someone or to disband a group.

**Leading individuals and groups** \_\_\_\_\_

Knowing each of your staff well enough to stimulate their particular talents and energy. Having the audacity, eloquence, and grit to inspire people to take risks and overcome obstacles.

**Working with conflict** \_\_\_\_\_

Having the sensitivity, patience, and skill to redirect an employee. Having the firmness and skills to negotiate and resolve conflicts promptly and constructively. Eliminating barriers among departments.

**Delegating opportunities and resources** (tool: Projects Summary) \_\_\_\_\_

Understanding the staff's workload and personal and collective capacity. Setting challenging, but not overwhelming assignments. Managing with little intervention. Delegating goals, not tasks.

Notes

*Development activities for the year (knowledge, skills, perspectives)*

% comp.


Manager: \_\_\_\_\_

## IV. Organization Perspective

Executives must align their organization with market trends and external forces.

Self-rating scale: 1 to 4. 1=Area of focus. 4=Sufficiency for current role. X=Not yet relevant.

Self-rating

### Creating an inspiring cause and vision \_\_\_\_\_

Ensuring every employee feels the organization's work has meaning. Expressing the facts and feelings of your cause so everyone will eagerly take on the risks and discomforts of change.

### Assessing organizational risks \_\_\_\_\_

Having the information to know what could go wrong within each management discipline (see The Index) and from external forces. Knowing if the organization can add risks or isn't risking enough.

### Planning (tool: Goal Tree) \_\_\_\_\_

Creating a challenging, yet realistic mix of short- and long-term goals to advance the organization's mission and vision. Keeping the organization focused on the goals.

### Creating a culture of collaboration \_\_\_\_\_

Understanding how all the formal and informal rules of behavior help everyone feel safe and contribute the most individually and collectively. Knowing when and how to reshape those rules.

### Aligning with other organizations \_\_\_\_\_

Working to the mutual benefit of new and existing customers, vendors, and affiliates. Anticipating and then adjusting to changes to any part of that network.

### Advocating in the community \_\_\_\_\_

Working with industry, community, and governmental bodies to protect your organization's markets, reputation, opportunities, and against threats outside your control.

Notes

*Development activities for the year (knowledge, skills, perspectives)*

% comp.


**Do you still enjoy being a manager?** \_\_\_\_\_

**Date for next self-assessment:** \_\_\_\_\_