



AMA Business Boot Camp

Management and Leadership Fundamentals That Will See You Successfully Through Your Career

by Edward T. Reilly
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Take-Aways

- Managers succeed by leading, motivating and delegating to their employees.
- At various times in their careers, managers can play eight different roles:
- A manager must be ready to be a “leader, director, contributor, coach, facilitator, observer, innovator,” and “organizer.”
- Managers determine critical resource allocations every day.
- In “flat organizations,” managers collaborate with self-motivated employees.
- Managers must communicate clearly about processes and projects with their superiors and team members.
- Meetings are crucial tools for interacting with employees, but productive meetings require careful planning.
- Five “motivational factors” inspire staffers: “achievement, responsibility, meaningfulness, recognition, and opportunities for growth and advancement.”
- Projects depend on your ability to manage multiple processes from “planning and executing to monitoring, controlling and closing.”
- As a leader, develop a “strategic frame of reference” to move your organization forward.

Rating (10 is best)

Overall	Applicability	Innovation	Style
7	9	5	7

Relevance

What You Will Learn

In this summary, you will learn: 1) What roles managers play and the skills they need, 2) How to delegate to and communicate with team members, 3) How to interview job applicants, 4) What constitutes effective project management and 5) How managers should lead.

Recommendation

When it comes to learning the skills you need to run a business, you are in good hands with the American Management Association (AMA). In this comprehensive manual for corporate managers, editor Edward T. Reilly, president and CEO of the AMA, expertly covers the topics you must know to be an effective leader and manager. This is solid and reliable – though basic – guidance for all businesspeople. *getAbstract* recommends Reilly’s survey course to anyone, particularly newer managers, seeking up-to-date business management information.

Summary

The Big Questions

Managers must be able to answer two recurring questions to the best of their ability:

1. What are the “time, money and staffing” needs of upcoming projects?
2. Given limited resources, which projects will deliver the biggest returns?

Your resource allocations won’t matter unless your employees do the work once they have the time, money and equipment. Your staff members determine your success – or failure – as a manager. Managers must lead their teams to accomplish goal-driven tasks in a timely and productive manner according to proper quality standards. But that’s not all managers must do.

Managers’ Roles

At various times in their careers, managers will likely play any or all eight roles:

1. **“Leader”** – Leaders take a strategic, “big-picture view” and think through how the firm can achieve its objectives. Leaders must be excellent communicators in order to develop effective working relationships both within and outside their organizations.
2. **“Director”** – Directors “define a problem” and discover solutions. They set goals, lead planning and delegate work appropriately.
3. **“Contributor”** – Contributors carry out the pivotal tasks that motivate employees to do their most productive work.
4. **“Coach”** – Coaches work with staffers to help them attain their potential.
5. **“Facilitator”** – Facilitators build teams and handle conflicts to create “cohesion.”
6. **“Observer”** – Observers monitor work progress and help team members stay on track.
7. **“Innovator”** – Innovators introduce new ideas and help others adapt to change.
8. **“Organizer”** – Organizers establish “tasks and structures” to handle work efficiently.

“Your employees will have more influence on your success than any other group or individual.”

“Accomplishing work through others is the manager’s primary job.”

“The shift toward a strategic mindset is essential for managers who must help their organizations succeed in an environment of continual change.”

“Project management means people management.”

“Many interviewers talk too much, erroneously believing that they’re more in control of the interview as long as they’re talking.”

“You do not have to be in a senior management position to need senior management skills.”

These roles call for managers to “plan, delegate, motivate, support, team-build, inform, change” and “coordinate.” To be able to apply these skills, it is essential for managers to work in a proper work environment.

“Flat Organizations”

In the past, corporate leaders defined the business environment with hierarchies and organization charts. Under this traditional “directive” system, managers were bosses who ordered workers to do their jobs. In contrast, flat organizations are collaborative enterprises where employees supervise themselves. Because staffers make decisions and are in charge of their own work, they are self-motivating.

Successful organizations – whether directive or flat – exhibit specific qualities: Their employees know the company’s vision and what they must do to achieve it. They work together, using the requisite skills and proper motivation. Managers make sure that their workers have the resources they need, including the right amount of coaching.

Managing Communications

Effective managers communicate clearly about processes and projects. They use meetings, conference calls and other tools to convey information about “team objectives and goals, employee performance, key personnel shifts, change in major customer [and] stakeholder relationships” and “financial news.”

Communicate upward with your supervisors and keep them advised using the performance reports your organization prefers. Professional communication goes beyond issuing orders or pronouncements. It requires asking the right questions in the following four different formats:

1. **“Open-ended questions”** – These prompt discussions and detailed responses. For instance, you might ask, “What are some of the ways you might use that speaker’s information on rapport building?”
2. **“Close-ended questions”** – These seek yes or no answers, for example, “Do you plan to use the speaker’s techniques for rapport building?”
3. **“Probing questions”** – This is a way to follow up on earlier statements: “How will you use the speaker’s information on rapport building?”
4. **“Hypothetical questions”** – Use this kind of query to examine anticipated situations: “If the customer seems uncomfortable with the discussion, what are some of the ways you might put him more at ease?”

Applicant Interviews

To understand how these types of questions work, consider how you would use them to interview a job applicant. Ask open-ended questions – “How would you describe yourself as an employee? Co-worker? Manager?” Use close-ended questions – “Are you aware that the starting salary for this job is...?” Probing questions reveal personal information: “What motivates you? Why?” Hypothetical questions show you how an applicant handles problems: “What would you say to an employee who challenged your authority?” To find the right applicants, consider “advertising, campus recruiting, employee referrals, online social networks and job sites, employment agencies, former applicants, government agencies, job fairs, job postings, military recruiting, open houses, professional associations, and radio and television.”

“The more you wisely empower others, the more power you accumulate. You gain power by sharing it.”

“The use of ‘manager’ as a title has fallen into disrepute in many organizations, with the new nomenclature including such terms as team leader and project coordinator.”

“The coaching process is about developing a strategy for a course of action, as opposed to throwing out ideas for improvement.”

“Success is a by-product of character, skill, judgment and action taken toward a specific goal.”

Managing Meetings

Meetings are crucial tools for communicating with your team members, but successful meetings require careful planning. Announce each meeting in writing, using the “PAL” system to communicate particulars: Explain the “purpose” of the meeting, detail the “agenda” and state the meeting’s anticipated “length.” Make sure that your meetings have a well-understood goal. Don’t start sessions late or run them longer than announced.

Keep meetings organized. Designate a “timekeeper, agenda cop, scribe and moderator.” Don’t oppress attendees with too much information. Make sure that everyone participates. Start with information about the meeting’s goals. Stick to the agenda. Note interesting “off-topic ideas” for future discussion. Ask people who are silent to speak up. Recap at the end of the meeting. Confirm that everyone understands the meeting’s results. If another meeting is necessary, ensure that everyone agrees and knows when and where it will take place. At the end of a meeting, ask participants to evaluate it. Pay attention to feedback to make your next meetings better.

Managing Motivation and Performance

Constantly and regularly monitor unit and workforce performance. Review results at least once every quarter, not just annually. Top performance depends on employees taking responsibility for clear objectives. Use the SMART system to set goals, which should be: “specific, measurable, attainable, relevant, trackable and time-bound.” A well-planned objective might be to “increase sales of project management software applications by 10% by end of year.”

Use an online digital calendar to help employees stay on schedule. List all meetings, update changes and add recurring events. Since almost everyone today has a smartphone, digital calendars – which work beautifully on mobile devices – provide full accessibility.

To inspire employees to do their best work, leverage five pivotal “motivational factors”:

1. **“Achievement”** – Work must give employees a sense of accomplishing something worthwhile and meaningful.
2. **“Responsibility”** – People need to be accountable for their efforts.
3. **“Meaningfulness”** – Their work must matter.
4. **“Recognition”** – Staffers should see that their manager knows and values their work.
5. **“Opportunities for growth and advancement”** – Employees who know they can progress stay motivated.

Delegating, which is crucial to managing employees and achieving results through their work, involves five steps: 1) Determine a budget, deadlines and goals for the task you’re delegating; 2) Select the right person for the job; 3) Make the assignment, providing all information and defining responsibilities; 4) Inform others about the appointment and keep your appointee updated; and 5) Monitor the work and provide routine feedback.

Managing Projects

Success with projects depends on your ability to manage multiple processes at once, from “planning and executing to monitoring, controlling and closing.” Project managers must handle “time, cost and scope” constraints, plus “risk, resources [and] quality.” Develop a project charter that spells out the details, including goals and policies. The Project Management Institute’s *A Guide to the Project Management Body of Knowledge* can help.

“Influence and power are the energizing forces that get things going and get things done.”

“Sometimes to get results and protect the interests of their followers, leaders must engage effectively in organizational politics.”

“The only motivation that truly works is self-motivation.”

“As important as knowing how to influence is knowing whom to influence.”

Use the “Critical Path Method” to schedule projects. This program shows how long each task will last and gives you the “float” for each task, that is, any allowable delay time. You can also use a calendar to plan, monitor and control your projects. Color-code your project-status reports: Green indicates that things are on schedule, yellow means that activities are slightly delayed and red signifies that the project is in trouble.

Make sure that your project team members ask and answer these questions during status meetings: “What did I accomplish yesterday?” “What will I accomplish today?” and “Is there anything that will prevent me from accomplishing what I plan to do today?” To manage changes on projects, target each adjustment, document it, approve or reject it, and control all alterations. Once the project is complete, learn from your successes and mistakes. Archive your project records for other project managers.

Managing Teams

To lead people to achieve your company’s goals, remember the SPARK acronym: “Share information. Play to strengths. Ask for input and appreciate different ideas. Recognize and respond to individual needs. Keep your commitments.”

Measure your success according to the following criteria: Delegation results in completed work that attains recognized standards of quality; teams thrive and constantly learn; morale remains high; managers recognize their teams for their good work; systems that are instituted by managers work well; and staffers routinely engage in strategic thinking and planning.

As a leader, develop a “strategic frame of reference” that focuses on “short- and long-term challenges, systems and people, and innovation and imitation.” To establish this framework, you should include a vision of where your organization will be in the future, a sense of mission, a set of goals and the steps to get there, and the strategies you will use to accomplish these steps. It should also spell out tactics – who takes care of what and when – and relationships – how individuals work with their team members and other people to attain organizational goals.

Putting It All Together

Business management starts with personal and team management. Conduct a self-assessment of how you handle the manager’s eight roles. Be honest about how your supervisors and employees see you. Target a few actions you can take to become a more effective manager. Emulate successful managers. Study project management. Learn what works and what doesn’t.

Think strategically. Ensure that your team ranks its problems and opportunities. Communicate with the members openly and clearly. Pay attention to the “generational differences” among your employees; adapt your leadership style to the people you lead. Be ready to engage in office politics when necessary to protect yourself or your team. Work hard to motivate your team members. Be solicitous of your allies.

About the Author

Edward T. Reilly, former president of the McGraw-Hill Broadcasting Company and of Big Flower Holdings Inc., is president and CEO of the American Management Association, International.