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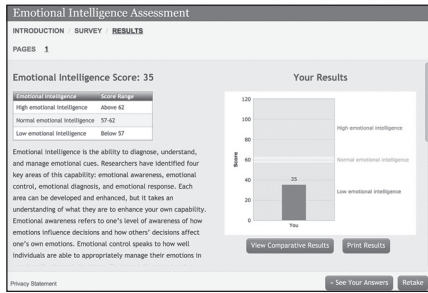


Developing Management Skills

TENTH EDITION

David A. Whetten
Kim S. Cameron

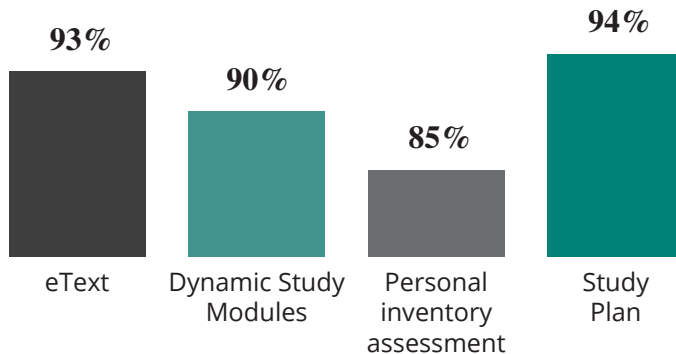




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DEVELOPING MANAGEMENT SKILLS

TENTH EDITION
GLOBAL EDITION

David A. Whetten
BRIGHAM YOUNG UNIVERSITY

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UNIVERSITY OF MICHIGAN



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Product Management: Yajnaseni Das and Ishita Sinha
Content Strategy: Steven Jackson, Kajori Chattopadhyay, and Amrita Roy
Product Marketing: Wendy Gordon, Ashish Jain, and Ellen Harris
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Production: Vamanan Namboodiri and Nitin Shankar
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Authorized adaptation from the United States edition, entitled Developing Management Skills, 10th Edition, ISBN 978-0-13-517546-0 by David A. Whetten and Kim S. Cameron, published by Pearson Education © 2020.

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ISBN 10: 1-292-45774-0
ISBN 13: 978-1-292-45774-1
eBook ISBN: 978-1-292-72603-8

British Library Cataloguing-in-Publication Data
A catalogue record for this book is available from the British Library

1 21

Typeset in Weidemann ITC Pro and 10 pt by Integra Software Service

Printed and bound by B2R Technologies Pvt. Ltd.

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PREFACE

Why Focus on Management Skill Development?

Given that a “skill development” course requires more time and effort than a course using the traditional lecture/discussion format, we are sometimes asked this question by students, especially those who have relatively little work experience.

Reason #1: It focuses attention on what effective managers actually do.

In an influential article, Henry Mintzberg (1975) argued that management education had almost nothing to say about what managers actually *do* from day to day. He further faulted management textbooks for introducing students to the leading theories about management while ignoring what is known about effective management practice. Sympathetic to Mintzberg’s critique, we set out to identify the defining competencies of effective managers.

Although no two management positions are exactly the same, the research summarized in the Introduction highlights ten personal, interpersonal, and group skills that form the core of effective management practice. Each chapter addresses one of these skills:

Personal Skills

1. Developing Self-Awareness
2. Managing Stress and Well-Being
3. Solving Problems Analytically and Creatively

Interpersonal Skills

4. Building Relationships by Communicating Supportively
5. Gaining Power and Influence
6. Motivating Performance
7. Negotiating and Resolving Conflict

Group Skills

8. Empowering and Engaging Others
9. Building Effective Teams and Teamwork
10. Leading Positive Change

Consistent with our focus on promoting effective management practice, the material in these chapters provides guidance for a variety of contemporary management challenges, including: “How can I help others accept new goals, new ideas, new

approaches?” “How can I invigorate those who feel outdated and left behind?” “How do I help the ‘survivors’ of a downsizing pick up the pieces and move on?” “How do I help people with very different agendas and philosophies work together, especially during periods of high stress and uncertainty?”

Anyone tempted to dismissively argue that the answers to these questions are “common sense” would do well to recall Will Rogers’ pithy observation: “Common sense ain’t necessarily common practice.” In addition, the research reported in the Introduction suggests that, in many cases, managers’ “common sense” isn’t necessarily “good sense.”

The premise of this book and associated course is that the key to effective management practice is practicing what effective managers—those with “good sense”—do consistently.

Reason #2: It is consistent with proven principles of effective teaching and learning.

A seasoned university professor advised a young colleague, “If your students aren’t learning, you’re not teaching—you’re just talking!” Here’s what some authorities on higher education have to say about how effective teachers foster learning:

“All genuine learning is active, not passive. It is a process of discovery in which the student is the main agent, not the teacher.” (Adler, 1982)

“Learning is not a spectator sport. Students do not learn much just by sitting in a class listening to teachers, memorizing pre-packaged assignments, and spilling out answers. They must talk about what they are learning, write about it, relate it to past experiences, apply it to their daily lives. They must make what they learn part of themselves.” (Chickering & Gamson, 1987)

In their classic book, Bonwell and Elson (1991) list seven defining characteristics of active learning:

1. Students are involved in more than passive listening.
2. Students are engaged in activities (e.g., reading, discussing, writing).
3. There is less emphasis placed on information transmission and greater emphasis placed on developing student skills.
4. There is greater emphasis placed on the exploration of attitudes and values.
5. Student motivation is increased, especially in adult learners.
6. Students receive immediate feedback from their instructor and peers.
7. Students are involved in higher order thinking (analysis, synthesis, evaluation).

Our goals in writing this book were to bridge the academic realm of theory and research and the organizational realm of effective practice and to help students consistently translate proven principles from both realms into personal practice. To accomplish these goals, we formulated a five-step “active” learning model, described in the Introduction. Based on the positive feedback we’ve received from teachers and students as well as multiple empirical research studies, we can state with confidence that the form of active learning pioneered in this book is a proven pedagogy for management skill mastery.

MYLAB MANAGEMENT SUGGESTED ACTIVITIES

For the 10th edition we the authors are excited that Pearson’s MyLab Management has been integrated fully into the text. These new features are outlined below. Making assessment activities available on line for students to complete before coming to class will allow you the professor more discussion time during the class to review areas that students are having difficulty in comprehending.

Watch It

MyLab recommends video clips that can be assigned to students for outside classroom viewing or that can be watched in the classroom. The videos correspond to the chapter material and is accompanied by multiple choice questions that re-enforce student's comprehension of the chapter content.

Personal Inventory Assessments (PIA)

Students learn better when they can connect what they are learning to their personal experience. PIA (Personal Inventory Assessments) is a collection of online exercises designed to promote self-reflection and engagement in students, enhancing their ability to connect with concepts taught in principles of management, organizational behavior, and human resource management classes. Assessments are assignable by instructors who can then track students' completions. Student results include a written explanation along with a graphic display that shows how their results compare to the class as a whole. Instructors will also have access to this graphic representation of results to promote classroom discussion.

DETAILED CHAPTER BY CHAPTER CHANGES

Based on suggestions from reviewers, instructors, and students, we have made a number of changes in the tenth edition of *Developing Management Skills*.

Introduction

- Updated references
- Clarified writing, especially sensitive to international perspectives and gender

Chapter 1 – Developing Self-Awareness

- Updated pre-assessment instruments, paying special attention to gender and nationality
- Updated references throughout the chapter
- Created new cases in the Skill Analysis section
- Updated scenarios in the Skill Practice section

Chapter 2 – Managing Stress and Well-Being

- Updated references throughout the chapter
- Added cases on stress and stress management among Millennials in the Skill Analysis section
- Added an up-to-date Skill Practice exercise

Chapter 3 – Solving Problems Analytically and Creatively

- Updated references and examples throughout the chapter
- Replaced cases in the Skill Analysis section
- Updated the Creative Problem-Solving Practice scenarios

Chapter 4 – Building Relationships by Communicating Supportively

- Updated references throughout the chapter
- Updated cases in the Skill Analysis section
- Updated exercises in the Skill Practice section

Chapter 5 – Gaining Power and Influence

- Updated references throughout the chapter
- Enhanced material on social capital
- Added a section on Sexual Harassment
- Updated the cases in Skill Analysis section

Chapter 6 – Motivating Performance

- Adopted new chapter title, emphasizing the use of motivation to enhance performance
- Updated references and examples throughout the chapter
- Expanded section on intrinsic reinforcement
- Added section on diagnosing and correcting unacceptable performance
- Added new Skill Practice exercise

Chapter 7 – Negotiating and Resolving Conflict

- Adopted new chapter title, reflecting expanded focus
- Updated references and examples throughout the chapter
- Added a section on negotiations
- Added new negotiations exercises in the Skill Practice section
- Updated the cases and exercises

Chapter 8 – Empowering and Engaging Others

- Updated references throughout the chapter
- Added a new case to the Skill Analysis section
- Updated exercises in the Skill Practice section

Chapter 9 – Building Effective Teams and Teamwork

- Updated references and examples throughout the chapter
- Created a new case in the Skill Analysis section
- Updated Skill Practice exercises

Chapter 10 – Leading Positive Change

- Updated references throughout the chapter
- Updated Corporate Vision Statements in the Skill Analysis section
- Added an exercise to the Skill Practice section

Tips for Getting the Most Out of This Course

Whether you are an undergraduate or MBA student, or an experienced manager, based on our years of teaching management skills, here are some suggestions for making this course a personally meaningful learning experience:

- Read the Introduction carefully. Although this is not a typical management textbook, it is important that you understand its distinctive learner-focused features, especially the five-step learning model: Skill Assessment, Skill Learning, Skill Analysis, Skill Practice, and Skill Application. You'll also find informative research on how much managers' actions impact individual and organizational performance and the characteristics of effective managers.
- Thoughtfully complete the Skill Assessment surveys for each chapter. These diagnostic tools are designed to help you identify which specific aspects of each skill topic most warrant your personal attention.
- Carefully study the Behavioral Guidelines and the summary model at the conclusion of the Skill Learning section of each chapter before reading that section. These written and graphical summaries are designed to bridge the research-informed description of each topic with the skill development activities that follow. To help you internalize research-informed "good sense," be sure to use the Behavioral Guidelines as your frame of reference when reading and discussing Skill Analysis cases and participating in Skill Practice and Skill Application exercises.
- Be sure to complete the Skill Application exercises in each chapter. Management skill mastery requires out-of-class skill practice. How to do this is pretty straightforward if you are currently working in an organization, regardless of whether you are an experienced manager or a new, part-time employee. Whether or not you are currently employed, we encourage you to seek out skill practice opportunities in all aspects of your life, including working in assigned teams in this and other courses, planning social events for a campus or community organization, counseling a troubled sibling or friend, managing end-of-semester deadlines, or handling a difficult issue with a boy/girlfriend or spouse. The sooner you begin—and the more you persist in—practicing what you learn in this course, the more you'll be able to count on these skills as "automatic responses" when you need them as a manager.

INSTRUCTOR RESOURCE CENTER

At <http://www.pearsonglobaleditions.com/>, instructors can easily register to gain access to a variety of instructor resources available with this text in downloadable format. If assistance is needed, our dedicated technical support team is ready to help with the media supplements that accompany this text. Visit <https://support.pearson.com/getsupport> for answers to frequently asked questions and toll-free user support phone numbers.

The following supplements are available with this text:

- Instructor's Resource Manual
- Test Bank
- TestGen[®] Computerized Test Bank
- PowerPoint Presentation

This title is available as an eBook and can be purchased at most eBook retailers.

Acknowledgments

In addition to the informal feedback we have received from colleagues around the world, we would especially like to thank the following people who have formally reviewed material and provided valuable feedback, vital to the revision of this and previous editions:

Richard Allan, University of Tennessee–Chattanooga	Stanley Harris, Auburn University
Joseph S Anderson, Northern Arizona University	Richard E. Hunt, Rockhurst College
Forrest F. Aven, University of Houston	Daniel F. Jennings, Baylor University
Lloyd Baird, Boston University	Avis L. Johnson, University of Akron
Bud Baker, Wright State University	Jay T. Knippen, University of South Florida
John D. Bigelow, Boise State University	Roland Kushner, Lafayette College
Ralph R. Braithwaite, University of Hartford	Roy J. Lewicki, Ohio State University
Julia Britt, California State University	Michael Lombardo, Center for Creative Leadership
Tim Bothell, Brigham Young University	Charles C. Manz, University of Massachusetts–Amherst
David Cherrington, Brigham Young University	Ralph F. Mullin, Central Missouri State University
John Collins, Syracuse University	Thomas J. Naughton, Wayne State University
Kerri Crowne, Temple University	J. Randolph New, University of Richmond
Joseph V. DePalma, Farleigh Dickerson University	Jon L. Pierce, University of Minnesota–Duluth
Todd Dewett, Wright State University	Lyman Porter, University of California–Irvine
Andrew J. Dubrin, Rochester Institute of Technology	Lyle F. Schoenfeldt, Appalachian State University
Steven Edelson, Temple University	Jacop P. Siegel, University of Toronto
Crissie M. Frye, Eastern Michigan University	Charles Smith, Hofstra University
Norma Givens, Fort Valley State University	Noel M. Tichy, University of Michigan
Barbara A. Gorski, St. Thomas University	Wanda V. Trenner, Ferris State University
Sara Grant, New York University	Ulya Tsolmon, Brigham Young University
David Hampton, San Diego State University	Kenneth M. York, Oakland University
Jason Harris-Boundy, San Francisco State University	

We especially thank our collaborators who adapted the book for the European and Australian markets as well as those who translated *Developing Management Skills* into Spanish, Russian, Chinese, and Dutch.

We are grateful for the assistance of many dedicated associates who have helped us continually upgrade and enhance *Developing Management Skills*. We wish to acknowledge our colleague, Jeffrey Thompson, Director of the Romney Institute of Public Management, Brigham Young University. Jeff has been a valuable collaborator on our recent revisions and has become a major part of the authoring team.

Finally, and most importantly, we express appreciation to our families for their ongoing patience and support, which is reflected in their willingness to share their time with this competing “labor of love”—and to forgive our own gaps between common sense and common practice.

*David A. Whetten
Kim S. Cameron*

GLOBAL EDITION ACKNOWLEDGMENTS

Pearson would like to thank the following people for their work on the Global Edition:

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Jon and Diane Sutherland

Reviewers

David Ahlstrom, *The Chinese University of Hong Kong*

Kate Barnett-Richards, *Coventry University*

Shishank Shishank, *Birmingham City University*

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MANAGEMENT CONCEPTS

- The Critical Role of Management Skills
- The Importance of Competent Managers
- The Skills of Effective Managers
- Employability
- What Are Management Skills?
- Improving Management Skills
- An Approach to Skill Development
- Leadership and Management
- Contents of the Book
- Organization of the Book
- Diversity and Individual Differences
- Summary

SUPPLEMENTARY *MATERIAL*

- Personal Assessment of Management Skills (PAMS)
- What Does It Take to Be an Effective Manager?
- SSS Software In-Basket Exercise

SCORING KEY AND *COMPARISON DATA*



INTRODUCTION

The Critical Role of Management Skills

LEARNING OBJECTIVES

1. Introduce the importance of management skills
2. Identify essential management skills
3. Explain a learning model for developing management skills
4. Review the contents of the book

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Introduction

The Critical Role of Management Skills

No one doubts that the twenty-first century will continue to be characterized by chaotic, transformational, rapid-fire change. In fact, almost no sane person is willing to predict what the world will be like 50, 20, or even 10 years from now. Change is just too rapid and ubiquitous. Three-quarters of the content on the Web was not available three years ago. The development of “nanobombs” has caused some people to predict that personal computers and desktop monitors will land on the scrap heap of obsolescence within 20 years. The new computers will be a product of etchings on molecules leading to personalized data processors injected into the bloodstream, implanted in eyeglasses, or included in wrist bands.

Warren Bennis, a colleague of ours, half-jokingly predicted that the factory of the future would have only two employees, a person and a dog. The person would be there to feed the dog. The dog would be there to keep the person from touching the equipment! Almost no one would argue with the claim that “permanent white water” best characterizes our current environment. Almost everything is in flux, from our technology and methods of transacting business to the nature of education and the definition of the family.

Despite all this change in our environment, there is something that has remained relatively constant. With minor variations and stylistic differences, what have not changed in several thousand years are the basic skills that lie at the heart of effective, satisfying, growth-producing human relationships. Freedom, dignity, trust, love, and respect in relationships have always been among the goals of human beings, and the same principles that brought about those outcomes in the second or seventeenth centuries still bring them about in the twenty-first century. Despite our circumstances, in other words, and despite the technological resources we have available to us, the same basic human skills still lie at the heart of effective human interaction.

This book is built on the presumption that developing management skills—that is, the skills needed to manage one’s own life as well as relationships with others—is a ceaseless endeavor. These skills were largely the same a century ago as they are today. The basic behavioral principles that lie at the foundation of these skills are timeless. This is one reason why the shelves of bookstores, blogs, and online newsletters are filled with descriptions of how one more executive or one more company struck it rich or beat out the competition. Thousands

of books trumpet prescriptions for how to be successful in business, or in life. Many of these books have made it to the best-seller lists, where they have enjoyed lengthy stays.

Our intention in this book is not to try to duplicate the popular appeal of the best-selling books or to utilize the common formula of recounting anecdotal incidents of successful organizations or well-known managers. We have produced a book that is based on, and remains true to, social science and business research. We want to share with you what is known and what is not known about how to develop management skills and how to foster productive, healthy, satisfying, and growth-producing relationships with others in your work setting. *Developing Management Skills* is designed to help you actually improve your personal management competencies—to change your behavior.

In a recent survey of 985 college instructors sponsored by Pearson, the publisher of this book, 82 percent rated the development of *employability skills* to be important or very important for their students. Employability skills in the survey referred to the very same competencies that are covered in this text—that is, problem-solving, communication, teamwork, self-management, creative thinking, and leadership. More than 90 percent of instructors indicated that these skills should be developed in the classroom. Seldom, however, are materials available or courses designed to produce those outcomes, so these instructors expressed the need for a book to assist them in that endeavor.

This book, therefore, serves as a practicum or a guide to effective managerial skills, and it will assist in the development of the skills you need to be more employable. Not only will the skills covered in this book assist you in becoming employable in your first job, but after your first promotion, you will most likely be in a managerial role, and these management skills will be even more important in contributing to your success. Whereas the skills in this book focus on “management skills,” their relevance is not limited just to an organization or work setting. This book could be retitled “life skills,” “leadership skills,” or even “employability skills.” We focus mainly on work settings here because our primary goal is to help you prepare for and improve your own competency in a managerial role. You will discover, however, that these skills are applicable in most areas of your life—with families, friends, volunteer organizations, and your community.

In the next section, we review some of the scientific evidence that demonstrates how management skills are associated with personal and organizational success, and we review several studies of the key management skills that seem to be the most important in our modern-day environment. It is on those key skills that this book is targeted. We then describe a model and a methodology for helping you develop management skills.

A large number of fads abound proclaiming a new way to be a leader, get rich, or both, but our intent is to rely on a proven methodology that has grounding in the scientific literature. We present what has been shown to be a superior process for improving management skills, and we base our claims on scholarly evidence. This Introduction concludes with a brief description of the organization of the rest of the book and the importance of keeping in mind individual differences among people.

The Importance of Competent Managers

In the last couple of decades, an abundance of evidence has been produced demonstrating that skillful management is the single most powerful determinant of organizational success. Surveys by a variety of consulting firms in the past five years (e.g., Deloitte, Gallup, McKinsey, Mercer) have reconfirmed that leadership and management account for the most variance in organizational performance and employee well-being. These studies have been conducted across numerous industry sectors, international settings, and organization types. The research findings now make it almost unquestionable that if organizations want to succeed, they must have competent, skillful managers.

As an example, a study of 968 firms—the organizations whose managers were rated as effective in managing their people; that is, they implemented effective people management strategies and demonstrated personal competency in management skills—had, on average, more than a 7 percent decrease in turnover, increased profits of \$3,814 per employee, \$27,044 more in sales per employee, and \$18,641 more in stock market value per employee, compared to firms that had less-effective people management (Huselid, 1995; Pfeffer & Veiga, 1999). In a follow-up study of 702 firms, shareholder wealth was an amazing \$41,000 per employee higher in companies demonstrating strong people management skills than in firms that had a lower emphasis on people management (Huselid & Becker, 1997).

A study of German firms in 10 industrial sectors produced similar results: “Companies that place workers at the core of their strategies produce higher long-term returns . . . than their industry peers” (Blimes, Wetzker, & Xhonneux, 1997). A study of five-year survivability in 136 nonfinancial companies that issued IPOs in the late 1980s found that the effective management of people was the most significant factor in predicting longevity, even when accounting for industry type, size, and profits. Firms that did a good job of managing people tended to survive; others did not (Welbourne & Andrews, 1996).

A study at the University of Michigan investigated the factors that best accounted for financial success over a five-year span in 40 major manufacturing firms. The five most powerful predictors included market share (assuming that the higher the market share of a firm, the higher its profitability); firm capital intensity (assuming that the more a firm is automated and up to date in technology and equipment, the more profitable it is); size of the firm in assets (assuming that economies of scale and efficiency can be used in large firms to increase profitability); industry average return on sales (assuming that firms would reflect the performance of a highly profitable industry); and the ability of managers to effectively manage their people (assuming that an emphasis on good people management helps produce profitability in firms). The results revealed that one factor—the ability to manage people effectively—was three times more powerful than all other factors combined in accounting for firm financial success over a five-year period! We repeat: Good management was more important than all other factors taken together in predicting profitability.

This is just a small sampling of studies that indicate overwhelmingly that good management fosters financial success, whereas less-effective management fosters financial distress. Successful organizations have managers with well-developed management skills. Moreover, the data are clear that management skills are more important in accounting for success than industry, environment, competition, and economic factors combined.

The Skills of Effective Managers

What, then, differentiates effective managers from less-effective managers? If developing management skills is so crucial for organizational success, what skills ought to be the focus of our attention? In writing this book, we wanted to identify the skills and competencies that separate extraordinarily effective performers from the rest of us. So, in addition to reviewing the managerial and leadership literature, we also identified 402 individuals who were rated by their peers as highly effective managers in their own organizations in the fields of business, health care, education, and state government. We then interviewed those people to determine what attributes are associated with managerial effectiveness. We asked questions such as:

- ❑ How have you become so successful in this organization?
- ❑ Who fails and who succeeds in this organization, and why?

- ❑ If you had to train someone to take your place, what knowledge and what skills would you make certain that person possessed in order to perform successfully as your successor?
- ❑ If you could design an ideal curriculum or training program to teach you to be a better manager, what would it contain?
- ❑ Think of other effective managers you know. What skills do they demonstrate that explain their success?

Our analysis of the interviews produced about 60 characteristics of effective managers. The 10 identified most often are listed in Table 1. Not surprisingly, these 10 characteristics are all behavioral skills. They are not personality attributes or styles, nor are they generalizations such as “luck,” “charisma,” or “timing.” They also are common across industries, levels, and job responsibilities. The characteristics of effective managers are not a secret, and they are similar to the lists developed in other studies.

For example, the Miles Group and Stanford University conducted a study of the skills in which most CEOs and corporate directors needed coaching and development (Executive Coaching, 2013). The study identified the following skills, listed in the order of emphasis.

- ❑ Conflict management
- ❑ Listening
- ❑ Delegation
- ❑ Planning
- ❑ Mentoring and empowering
- ❑ Communication
- ❑ Team-building
- ❑ Compassion
- ❑ Persuasion and influence
- ❑ Interpersonal relationships
- ❑ Motivation

Note that these skills are almost exactly the same as those listed in Table 1, so each is addressed in this book. That is, this book provides you with the opportunity to develop and improve the most important skills that account for managerial success.

Table 1 Skills of Effective Managers—One Study

1. Verbal communication (including listening)
2. Managing time and stress
3. Rational and creative problem-solving
4. Recognizing, defining, and solving problems
5. Motivating and influencing others
6. Delegating and engaging others
7. Setting goals, articulating a vision, and leading change
8. Self-awareness
9. Team building
10. Managing conflict

What Are Management Skills?

There are several defining characteristics of management skills that differentiate them from other kinds of characteristics and practices. First, management skills are *behavioral*. They are not personality attributes or stylistic tendencies. Management skills consist of actions that lead to positive outcomes. Skills can be observed by others, unlike attributes that are purely attitudinal, stylistic, or embedded in personality.

Second, management skills are *controllable*. The performance of these behaviors is under your own control. Skills may involve other people and require cognitive work, but they are behaviors that you can govern yourself.

Third, management skills are *developable*. Performance can improve. Unlike IQ or certain personality or temperament attributes that remain relatively constant throughout life, you can improve your competency in skill performance through practice and feedback. You can progress from less competence to more competence in management skills, and that outcome is the primary objective of this book.

Fourth, management skills are *interrelated* and *overlapping*. It is difficult to demonstrate just one skill in isolation from others. Skills are not simplistic, repetitive behaviors; rather, they are integrated sets of complex responses. Improving one management skill will help you improve others.

Fifth, management skills are sometimes *contradictory* or *paradoxical*. For example, the core management skills are neither all soft and humanistic nor all hard-driving and directive. They are not exclusively oriented toward teamwork and interpersonal relations, nor are they exclusively oriented toward individualism and solitary decision-making. A variety of skills are typical of the most effective managers, and some of them may appear incompatible.

To illustrate, Cameron and Tschirhart (1988) assessed the skill performance of more than 500 midlevel and upper-middle managers in about 150 organizations. The 25 most frequently mentioned management skills, taken from about a dozen studies in the academic literature (such as those in Table 2), were measured. Statistical analyses revealed that the skills fell into four main groups, or clusters. One group of skills focused on participative and human relations skills (for example, supportive communication and team building), while another group focused on just the opposite; that is, competitiveness and control (for example, assertiveness, power, and influence skills). A third group focused on innovativeness and individual entrepreneurship (for example, creative problem-solving),

Table 2 A Model for Developing Management Skills

Components	Contents	Objectives
1. Skill assessment	Survey instruments Role-plays	Assess current level of skill competence and knowledge; create readiness to change.
2. Skill learning	Written text Behavioral guidelines	Teach validated principles and present a rationale for behavioral guidelines.
3. Skill analysis	Cases	Provide examples of appropriate and inappropriate skill performance. Analyze behavioral principles and reasons they work.
4. Skill practice	Exercises Simulations Role-plays	Practice behavioral guidelines. Adapt principles to personal style. Receive feedback and assistance.
5. Skill application	Assignments (behavioral and written)	Transfer classroom learning to real-life situations. Foster ongoing personal development.

while a fourth group emphasized the opposite type of skills; namely, maintaining order and rationality (for example, managing time and rational decision-making). One conclusion from this study is that effective managers are required to demonstrate paradoxical skills. That is, the most effective managers are both participative and hard-driving, both nurturing and competitive. They were able to be flexible and creative while also being controlled, stable, and rational (also see Cameron, et al., 2014). Our objective in this book is to help you develop that kind of behavioral competency and complexity.

Improving Management Skills

It is a bit unnerving that while average IQ scores have jumped approximately 25 points in the last century, emotional intelligence scores (EQ) have fallen. In a survey of 110 Fortune 500 CEOs, 87 percent were satisfied with the level of competence and analytic skills of business school graduates, 68 percent were satisfied with conceptual skills of graduates, but only 43 percent of the CEOs were satisfied with graduates' management skills, and only 28 percent were satisfied with their interpersonal skills and emotional intelligence!

The good news is that improvement in management skills has been found in both students and managers who have been exposed to the learning model presented in *Developing Management Skills*. For example, MBA students showed improvement of 50 to 300 percent on social skills over two years after taking courses based on the approach to developing management skills presented here. A greater amount of improvement occurred among students who applied these skills to aspects of their lives outside the classroom. In addition, a cohort of 45- to 55-year-old executives produced the same results as the MBA students. They also improved dramatically in their management skills even though most were already experienced in senior managerial positions (Boyatzis, 1996, 2000, 2005; Boyatzis, Cowen, & Kolb, 1995; Boyatzis, et al., 1996; Leonard, 1996; Rhee, 1997; Wheeler, 1999).

An Approach to Skill Development

The method that has been found to be most successful in helping individuals develop management skills is based on an adaptation of social learning theory (Bandura, 1977; Boyatzis, et al., 1995; Davis & Luthans, 1980). This learning theory relies on several principles.

1. In order to improve, individuals must be aware of their current level of skill competency so that they can be motivated to improve. For comparison, think about a weight-loss plan: You will have a difficult time losing weight if you don't know how much you weigh to begin with. Most of us receive very little feedback about our level of skill competency, so it is difficult to know how to get better. Therefore, to help you understand what skills to improve and why, an assessment activity is part of the learning model. The assessment activities take the form of self-evaluation instruments, case studies, or problems that help highlight personal strengths and weaknesses in a particular skill area.
2. Management skills and behavioral guidelines must be grounded in empirical evidence and social science theory. Because leaders and managers have such an important impact on their organizations' performance and on employee well-being, when we provide advice about how to be an effective manager, the advice and guidance needs to be grounded in evidence. A great number of self-help books have trumpeted advice for leaders and managers, but empirical evidence showing that this advice actually works is very rare. Scientifically based knowledge about the effects of the management principles being presented is a prerequisite for an effective

learning model, so the Skill Learning section of each chapter is based on empirically verified principles.

3. Case examples of best practices, applications in different circumstances, and the nuances associated with management skills are often helpful in developing competency. Therefore, a skill analysis section is included in each chapter so that you can analyze when various aspects of the skills are best utilized and in what ways they can be applied.
4. Simply learning guidelines or principles, or analyzing how others demonstrate the skills, will not help people become better managers. You can read several books about bicycle riding, for example, but you won't get any better as a rider until you actually get on a bicycle and practice. The same is true of management skills. Each chapter in the book provides exercises, assignments, and activities that will help you practice management skills in a classroom setting where feedback is immediate. This provides a relatively safe environment in which you can try out new behaviors and make mistakes. The goal is to help you improve your behavioral competence.
5. An application component is also an important part of the learning model. If learning only takes place in a classroom setting, transferring learning to an actual job setting is often difficult. Therefore, application exercises in each chapter take the form of outside-of-class interventions, consulting assignments, self-analysis through journal writing, problem-centered interventions, or teaching assignments that you can practice in a real-world setting.

In summary, empirical evidence suggests that a five-step learning model is most effective for helping you develop management skills. Table 2 outlines such a model. Step 1 involves the *assessment* of current levels of skill competency and knowledge of the behavioral principles. Step 2 consists of the presentation of validated, scientifically based *principles and guidelines* for effective skill performance. Step 3 is an *analysis* step in which models or cases are presented in order to analyze behavioral principles in real organizational settings. This step also helps demonstrate how the behavioral guidelines can be adapted to different personal styles and circumstances. Step 4 consists of *practice* exercises in which experimentation can occur and immediate feedback can be received in a relatively safe environment. Step 5 is the *application* of the skill to a real-life setting outside the classroom with follow-up analysis of the relative success of that application.

Research on the effectiveness of training programs using this general learning model has shown that it produces results superior to those based on more traditional lecture, discussion, or case method approaches (Boyatzis, et al., 1995; Burnaska, 1976; Kolb, 1984; Latham & Saari, 1979; Moses & Ritchie, 1976; Porras & Anderson, 1981; Smith, 1976; Vance, 1993).

To assist you in improving your own management skills, this book emphasizes practicing management skills rather than just reading about them. We have organized the book with this specific approach in mind.

Leadership and Management

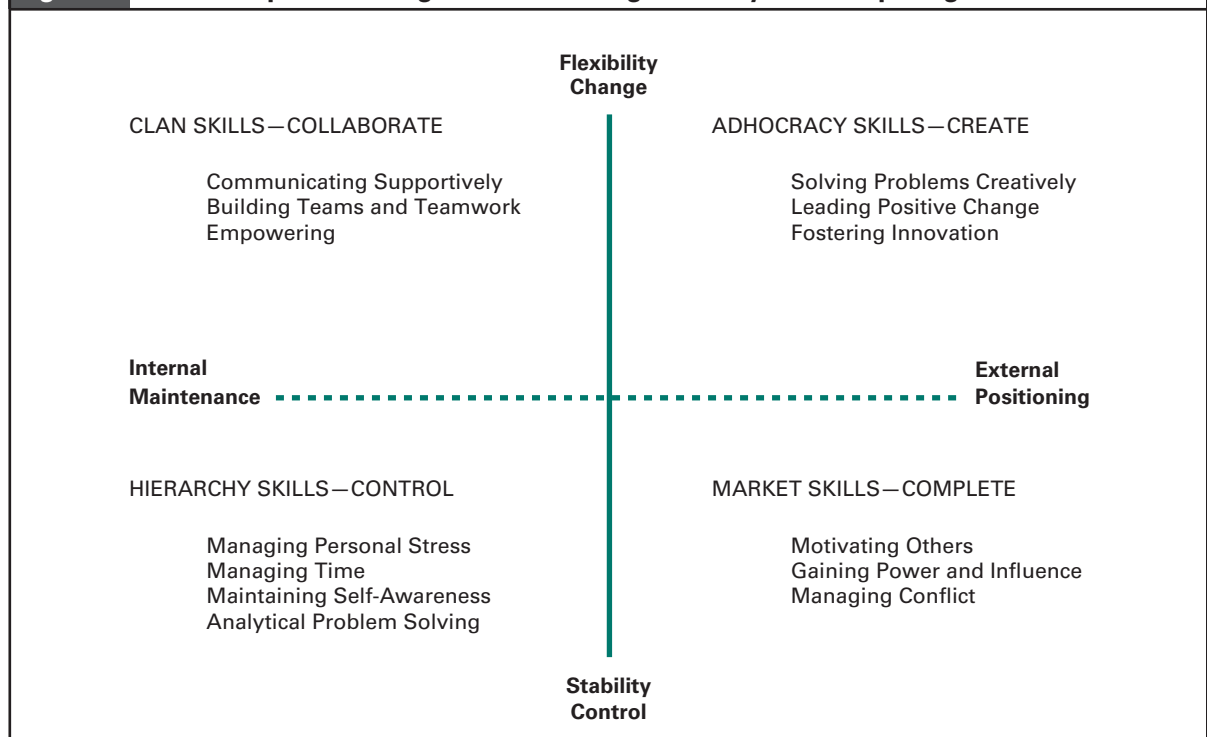
Before outlining the organization of this book, we want to briefly discuss the place of leadership in this volume. Some writers have differentiated between the concepts of “leadership” and “management” (Bass, 1990; Katzenbach, 1995; Nair, 1994; Quinn, 2000; Tichy, 1999). Some have wondered why we concentrate on “management” skills instead of “leadership” skills in this book. We have also been asked by professors, business executives, and students why we have not changed the title of the book to *Developing Leadership Skills* or at least included one chapter on leadership in this volume. These queries and suggestions are important and have motivated us to clarify at the outset of the book what we mean by management, and why our approach also lies at the heart of leadership as typically defined.

One of the most popular models of leadership is based on the “Competing Values Framework,” an organizing framework for leadership and managerial skills. It was developed by examining the criteria used to evaluate organizational performance (Cameron, et al., 2014; Quinn & Rohrbaugh, 1983). Extensive research has been conducted on this framework for more than three decades, and a brief explanation will help clarify the relationship between management and leadership skills. This research has shown that leadership and management skills fall into four clusters, or categories, as illustrated in Figure 1.

In order to be an effective leader and manager, the research suggests that you must be competent in: (1) people skills, collaboration, teamwork, and interpersonal communication. These are referred to in the academic literature as *clan skills* or *collaborate skills*; (2) creativity, innovativeness, entrepreneurship, and fashioning a vision for the future. These are referred to in the academic literature as *adhocracy skills* or *create skills*; (3) producing results, making fast decisions, competing aggressively, and being comfortable taking charge. These are referred to in the academic literature as *market skills* or *compete skills*; and (4) maintaining stability and predictability, increasing quality, being efficient, and maintaining control. These are referred to in the academic literature as *hierarchy skills* or *control skills*.

Clan or collaborate skills include those required to build effective interpersonal relationships and develop others (e.g., building teamwork, communicating supportively). Adhocracy or create skills include those required to manage the future, innovate, and promote change (e.g., solving problems creatively, articulating an energizing vision). Market or compete skills include those required to compete effectively and manage external relationships (e.g., motivating others, using power and influence). Hierarchy or control skills include those required to maintain control and stability (e.g., managing personal stress and time, solving problems rationally). (See Cameron & Quinn, 2006.)

Figure 1 Leadership and Management Skills Organized by the Competing Values Framework



In Figure 1, the two top quadrants in the Competing Values Framework—clan and adhocracy—are usually associated with leadership: i.e., “doing the right things,” such as setting direction, articulating a vision, transforming organizations, building teams, and creating something new. The two bottom quadrants—market and hierarchy—are usually associated with management: “doing things right,” such as maintaining control, monitoring, refining performance, solving problems, competing aggressively. Traditionally, leadership is often associated with what individuals do under conditions of change. When organizations are dynamic and undergoing transformation, people at the top are expected to exhibit leadership (i.e., pay attention to clan and adhocracy issues). “Management,” on the other hand, has traditionally been used to describe what executives do under conditions of stability; thus, management has been linked with the status quo (i.e., pay attention to market and hierarchy issues). In summary, leadership has been equated with dynamism, vibrancy, and charisma; management with hierarchy, equilibrium, and control.

However, the recent research is clear that such distinctions between leadership and management are neither accurate nor useful (Cameron, et al., 2014; Quinn, 2000). Managers cannot be successful without being good leaders, and leaders cannot be successful without being good managers. No longer do organizations and individuals have the luxury of holding onto the status quo; worrying about doing things right but failing to do the right things; keeping the system stable instead of leading change and improvement; monitoring current performance instead of formulating a vision for the future; concentrating on equilibrium and control instead of vibrancy and charisma. Effective management and leadership are inseparable. The skills required to do one are also required for the other.

No organization in a postindustrial, hyperturbulent, twenty-first-century environment will survive without executives capable of demonstrating both management and leadership skills. Leading change and managing stability, establishing vision and accomplishing objectives, breaking the rules and monitoring conformance, although paradoxical, all are required for success.

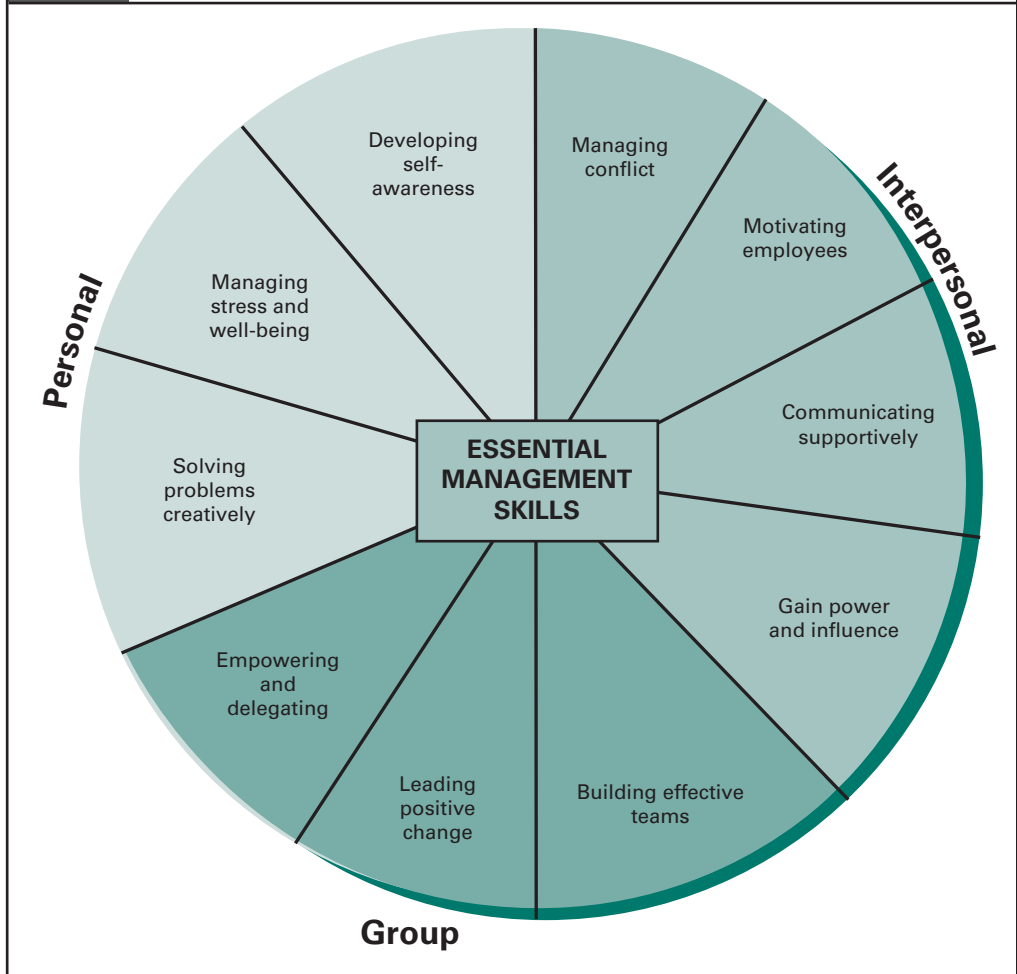
All of us, in other words, need to develop competencies that will enhance our ability to be both leaders and managers. The specific skills in this book represent all four quadrants in the Competing Values Framework of leadership. They serve as the foundation for effective management and for effective leadership. *The skills discussed in this book cover both management skills and leadership skills. We have chosen to use the label “management skills” to incorporate the skills associated with leadership as well as with management.* When you are promoted, you will be given a managerial role, and your success in that role will depend on the extent to which you have mastered specific skills. You can act as a leader in any context or role, so this book is designed to prepare you to be an effective manager as well as an effective leader.

Contents of the Book

To repeat, this book focuses on the skills that research has identified as critically important for successful management and leadership. Each chapter discusses a cluster of related behaviors, and these clusters of interrelated behaviors comprise the overall management skill indicated in the chapter’s title. Figure 2 also points out that each skill cluster is related to and overlaps with other personal management skills, so each relies at least partially on others to be performed successfully.

Part I contains three chapters on *personal skills*: Developing Self-Awareness, Managing Stress and Well-Being, and Solving Problems Analytically and Creatively. These skills focus on issues that may not involve other people but instead relate to the management of the self—hence they are called personal skills.

Figure 2 A Model of Essential Management Skills



Part II focuses on *interpersonal skills*: Building Relationships by Communicating Supportively, Gaining Power and Influence, Motivating Others, and Managing Conflict. These skills focus primarily on issues that arise in your interactions with other people. Part III includes three chapters on *group skills*: Empowering and Engaging Others, Building Effective Teams and Teamwork, and Leading Positive Change. These skills focus on key issues that arise when you are involved with other people either as a leader or as a member of the group. As you progress from personal to interpersonal to group skills, the core competencies developed in the previous skill area help support successful performance in the new skill area.

At the outset of this introductory chapter, we mentioned that Pearson Publishers conducted a survey of a large sample of college instructors. These instructors rated *employability skills* as being important or very important for their students to learn. A large majority of these faculty members also expressed a desire to have access to textbooks that would address these specific skills. Table 3 highlights the sections of this book that directly address employability skills. Sections of the book that help foster behavior change and improved competence in employability skills are highlighted, and the specific chapters whose content directly addresses these employability skills are noted.

Appendix I contains a glossary of key terms in the text, and Appendix II lists references for excerpted material in the book.

Table 3 Employability Skills and Developing Management Skills Content

Employability Skill	Content that assists in development
Critical Thinking	Skill Analysis section of each chapter Skill Practice section of each chapter Skill Application section of each chapter Especially content in Chapters 1, 3, 6, 7, and 10
Communication	Skill Analysis section of each chapter Skill Practice section of each chapter Skill Application section of each chapter Especially content in Chapters 4, 5, 6, 7, and 10
Collaboration	Skill Analysis section of each chapter Skill Practice section of each chapter Skill Application section of each chapter Especially content in Chapters 2, 3, 4, 6, 7, 8, and 9
Knowledge Application and Analysis	Skill Analysis section of each chapter Skill Practice section of each chapter Skill Application section of each chapter Especially content in Chapters 1, 3, and 10
Ethics and Social Responsibility	Skill Analysis section of each chapter Skill Practice section of each chapter Skill Application section of each chapter Especially content in Chapters 1, 3, 8, and 10

Organization of the Book

Each chapter is organized on the basis of the learning model summarized in Table 4. Specifically, each chapter begins with *Skill Assessment* instruments, followed by the largest section of the chapter, an explanation of the key behavioral guidelines along with evidence that confirms their validity. This is the *Skill Learning* section. The third section, *Skill Analysis*, provides brief case histories that illustrate both effective and ineffective applications of the behavioral principles. The *Skill Practice* section provides exercises, problems, and role-play assignments in order for you to practice the behavioral guidelines in a safe, simulated managerial situation and to receive feedback from peers and instructors. The last section of

Table 4 The Organization of Each Chapter

Section	Contents
Skill Assessment	Instruments designed to identify your current level of skill competency, your styles, and/or key dimensions of the skill. These instruments can be used to identify individual differences, issues surrounding diversity, and areas for personal improvement plans.
Skill Learning	Behavioral guidelines and key principles associated with the skill are explained. Scientific research is used as the basis for prescribed skill performance. Clarifying how to successfully develop and perform the skill is the purpose of this section.
Skill Analysis	Cases and examples provide examples of successful and unsuccessful skill performance. Analytic problem-solving is facilitated as recommendations are made for what the key issues are, how performance might be modified, and why success was achieved.
Skill Practice	Exercises and role-plays make it possible for individuals to actually practice the skill. Feedback from peers and the instructor will facilitate improvement of the skill in a setting where failure is not costly.
Skill Application	Suggested assignments are provided so that the skill can be applied in a real-life setting. A feedback mechanism is also suggested so that individuals analyze their own success in applying the skill outside the classroom. Improvement plans should always be associated with the application exercises.

each chapter is *Skill Application*. It contains a form to help you generate your own improvement agenda, as well as assignments and ideas for applying the skill in real-world situation.

Diversity and Individual Differences

One reason it is difficult to develop management skills is because all of us possess our own unique styles, personalities, and inclinations. We all know that everyone doesn't react in the same way to similar circumstances. It is impossible, therefore, to manage each relationship in exactly the same way, or even to behave the same way from one encounter to the next. Sensitivity to individual differences is an important part of an effective manager's repertoire.

A great deal of research has been conducted on cultural differences, gender differences, ethnic differences, and age differences in organizations (e.g., Abramson & Moran, 2017; Cameron, 2017). While we do not summarize that extensive research, we do want to highlight the importance of being sensitive to individuality. Two kinds of sensitivities are necessary: one to the uniqueness displayed by each person, and the other to distinctive but general patterns of behavior that characterize groups of people. For example, it is essential that you not only become aware of the differences that characterize people with whom you associate, but also that you value and capitalize on these differences. People's general tendency is to fear or oppose those who are different from us. Therefore, we provide a framework to help us all better understand and appreciate differences. We don't emphasize *managing diversity* as much as *diagnosing individual differences* so they can be valued, understood, and appreciated.

In Chapter 1, *Developing Self-Awareness*, we explain a model developed by Frans Trompenaars that relies on seven dimensions found to differ across national and cultural boundaries. These dimensions have been found to be very helpful in helping people understand key differences in others. They are: *universalism versus particularism*, *individualism versus communitarianism*, *specificity versus diffuseness*, *neutral versus affective*, *achievement versus ascription oriented*, *internal versus external*, and *past versus present versus future time emphasis*. These dimensions will help you adjust your behaviors when you interact with others from a different culture or nationality. Although the behavioral principles upon which the management skills are based are applicable across cultures, genders, ethnic groups, and age cohorts, important nuances may be required of you as you practice among people characterized by these differences. Women may not behave the same way as men. Japanese colleagues may not respond in the same way as German colleagues. Individuals in their sixties may not see the world in the same way as someone in their twenties. So being sensitive to and valuing individual differences is key.

Summary

In sum, *Developing Management Skills* is not intended just for individuals who plan to enter managerial positions or who currently manage organizations. It is meant to help you better manage many aspects of your life and relationships. It is intended to help you actually improve your behavior, to elevate your competence, and to become more effective in your relationships with different kinds of people. It is intended to improve your social and emotional intelligence. John Holt (1964, p. 165) succinctly summarized our intention by equating management skill to intelligence:

When we talk about intelligence, we do not mean the ability to get a good score on a certain kind of test or even the ability to do well in school; these are at best only indicators of something larger, deeper, and far more important. By intelligence we mean a style of life, a way of behaving in various situations. The true test of intelligence is not how much we know how to do, but how we behave when we don't know what to do.

Fostering the development of such intelligence is the goal of *Developing Management Skills*.

Diagnostic Survey and Exercises

Personal Assessment of Management Skills (PAMS)

Step 1: To get an overall profile of your level of skill competence, respond to the following statements using the rating scale below. Please rate your behavior as it is, not as you would like it to be. If you have not engaged in a specific activity, answer according to how you think you would behave based on your experience in similar activities. Be realistic; this instrument is designed to help you tailor your learning to your specific needs. After you have completed the survey, the scoring key at the end of the chapter will help you generate an overall profile of your management skill strengths and weaknesses.

Step 2: Get copies of the associates' version of this instrument from your instructor. An alternate version has been provided in the Instructor's Manual that uses "he" or "she" instead of "I" in the questions. Give copies to at least three other people who know you well or who have observed you in a situation in which you have had to lead or manage others. Those people should complete the instrument by rating your behavior. Bring the completed surveys back to class and compare: (1) your own ratings to your associates' ratings, (2) your associates' ratings to the ratings received by others in the class, and (3) the ratings you received to those of a national norm group.

Subsections of this instrument appear in each chapter throughout the book.

Rating Scale

- 1 Strongly disagree
- 2 Disagree
- 3 Slightly disagree
- 4 Slightly agree
- 5 Agree
- 6 Strongly agree

In regard to my level of self-knowledge:

- _____ 1. I seek information about my strengths and weaknesses from others as a basis for self-improvement.
- _____ 2. In order to improve, I am willing to be self-disclosing to others (that is, to share my beliefs and feelings).
- _____ 3. I am very much aware of my preferred style in gathering information and making decisions.
- _____ 4. I have a good sense of how I cope with situations that are ambiguous and uncertain.
- _____ 5. I have a well-developed set of personal standards and principles that guide my behavior.

When faced with stressful or time-pressured situations:

- _____ 6. I use effective time-management methods such as keeping track of my time, making to-do lists, and prioritizing tasks.
- _____ 7. I frequently affirm my priorities so that less important things don't drive out more important things.

- _____ 8. I maintain a program of regular exercise for fitness.
- _____ 9. I maintain an open, trusting relationship with someone with whom I can share my frustrations.
- _____ 10. I know and practice several temporary relaxation techniques, such as deep breathing and muscle relaxation.
- _____ 11. I maintain balance in my life by pursuing a variety of interests outside of work.

When I approach a typical, routine problem:

- _____ 12. I state clearly and explicitly what the problem is. I avoid trying to solve it until I have defined it.
- _____ 13. I always generate more than one alternative solution to the problem, instead of identifying only one obvious solution.
- _____ 14. I keep steps in the problem-solving process distinct; that is, I define the problem before proposing alternative solutions, and I generate alternatives before selecting a single solution.

When faced with a complex or difficult problem that does not have an easy solution:

- _____ 15. I try out several definitions of the problem. I don't limit myself to just one way to define it.
- _____ 16. I try to unfreeze my thinking by asking lots of questions about the nature of the problem before considering ways to solve it.
- _____ 17. I try to think about the problem from both the left (logical) side of my brain and the right (intuitive) side of my brain.
- _____ 18. I do not evaluate the merits of an alternative solution to the problem before I have generated a list of alternatives. That is, I avoid deciding on a solution until I have developed many possible solutions.
- _____ 19. I have some specific techniques that I use to help develop creative and innovative solutions to problems.

When trying to foster more creativity and innovation among those with whom I work:

- _____ 20. I make sure there are divergent points of view represented or expressed in every complex problem-solving situation.
- _____ 21. I try to acquire information from individuals outside the problem-solving group who will be affected by the decision, mainly to determine their preferences and expectations.
- _____ 22. I try to provide recognition not only to those who come up with creative ideas (the idea champions) but also to those who support others' ideas (supporters) and who provide resources to implement them (orchestrators).
- _____ 23. I encourage informed rule-breaking in pursuit of creative solutions.

In situations where I have to provide negative feedback or offer corrective advice:

- _____ 24. I am able to help others recognize and define their own problems when I counsel them.
- _____ 25. I am clear about when I should coach someone and when I should provide counseling instead.
- _____ 26. When I give feedback to others, I avoid referring to personal characteristics and focus on problems or solutions instead.

- _____ 27. When I try to correct someone's behavior, our relationship is almost always strengthened.
- _____ 28. I am descriptive in giving negative feedback to others. That is, I objectively describe events, their consequences, and my feelings about them.
- _____ 29. I take responsibility for my statements and point of view by using, for example, "I have decided" instead of "They have decided."
- _____ 30. I strive to identify some area of agreement in a discussion with someone who has a different point of view.
- _____ 31. I don't talk down to those who have less power or less information than I.
- _____ 32. When discussing someone's problem, I usually respond with a reply that indicates understanding rather than advice.

In a situation where it is important to obtain more power:

- _____ 33. I always put forth more effort and take more initiative than expected in my work.
- _____ 34. I am continually upgrading my skills and knowledge.
- _____ 35. I strongly support organizational ceremonial events and activities.
- _____ 36. I form a broad network of relationships with people throughout the organization at all levels.
- _____ 37. In my work I consistently strive to generate new ideas, initiate new activities, and minimize routine tasks.
- _____ 38. I consistently send personal notes to others when they accomplish something significant or when I pass along important information to them.
- _____ 39. I refuse to bargain with individuals who use high-pressure negotiation tactics.
- _____ 40. I always avoid using threats or demands to impose my will on others.

When another person needs to be motivated:

- _____ 41. I always determine if the person has the necessary resources and support to succeed in a task.
- _____ 42. I use a variety of rewards to reinforce exceptional performances.
- _____ 43. I design task assignments to make them interesting and challenging.
- _____ 44. I make sure the person gets timely feedback from those affected by task performance.
- _____ 45. I always help the person establish performance goals that are challenging, specific, and timebound.
- _____ 46. Only as a last resort do I attempt to reassign or release a poorly performing individual.
- _____ 47. I consistently discipline when effort is below expectations and capabilities.
- _____ 48. I make sure that people feel fairly and equitably treated.
- _____ 49. I provide immediate compliments and other forms of recognition for meaningful accomplishments.

When I see someone doing something that needs correcting:

- _____ 50. I avoid making personal accusations and attributing self-serving motives to the other person.

- _____ 51. I encourage two-way interaction by inviting the respondent to express his or her perspective and to ask questions.
- _____ 52. I make a specific request, detailing a more acceptable option.

When someone complains about something I've done:

- _____ 53. I show genuine concern and interest, even when I disagree.
- _____ 54. I seek additional information by asking questions that provide specific and descriptive information.
- _____ 55. I ask the other person to suggest more acceptable behaviors.

When two people are in conflict and I am the mediator:

- _____ 56. I do not take sides but remain neutral.
- _____ 57. I help the parties generate multiple alternatives.
- _____ 58. I help the parties find areas on which they agree.

In situations where I have an opportunity to engage people in accomplishing work:

- _____ 59. I help people feel competent in their work by recognizing and celebrating their small successes.
- _____ 60. I provide regular feedback and needed support.
- _____ 61. I try to provide all the information that people need to accomplish their tasks.
- _____ 62. I highlight the important impact that a person's work will have.

When engaging others in work:

- _____ 63. I specify clearly the results I desire.
- _____ 64. I specify clearly the level of initiative I want others to take (for example, wait for directions, do part of the task and then report, do the whole task and then report, and so forth).
- _____ 65. I allow participation by those accepting assignments regarding when and how work will be done.
- _____ 66. I avoid upward delegation by asking people to recommend solutions, rather than merely asking for advice or answers, when a problem is encountered.
- _____ 67. I follow up and maintain accountability for delegated tasks on a regular basis.

When I am in the role of leader in a team:

- _____ 68. I know how to establish credibility and influence among team members.
- _____ 69. I am clear and consistent about what I want to achieve.
- _____ 70. I build a common base of agreement in the team before moving forward with task accomplishment.
- _____ 71. I articulate a clear, motivating vision of what the team can achieve, along with specific short-term goals.

When I am in the role of team member:

- _____ 72. I know a variety of ways to facilitate task accomplishment in the team.
- _____ 73. I know a variety of ways to help build strong relationships and cohesion among team members.

When I desire to make my team perform well, regardless of whether I am a leader or member:

- _____ 74. I am knowledgeable about the different stages of team development experienced by most teams.
- _____ 75. I help the team avoid groupthink by making sure that sufficient diversity of opinions is expressed in the team.
- _____ 76. I can diagnose and capitalize on my team's core competencies, or unique strengths.
- _____ 77. I encourage the team to achieve dramatic breakthrough innovations as well as small continuous improvements.

When I am in a position to lead change:

- _____ 78. I create positive energy in others when I interact with them.
- _____ 79. I emphasize a higher purpose or meaning associated with the change I am leading.
- _____ 80. I express gratitude frequently and conspicuously, even for small acts.
- _____ 81. I emphasize building on strengths, not just overcoming weaknesses.
- _____ 82. I use a lot more positive comments than negative comments.
- _____ 83. When I communicate a vision, I capture people's hearts as well as their heads.
- _____ 84. I know how to get people to commit to my vision of positive change.

What Does It Take to Be an Effective Manager?

The purpose of this exercise is to help you get a firsthand picture of the role of a manager and the skills required to perform that job successfully.

Your assignment is to interview at least three managers who are employed full-time. You should use the questions below in your interviews, plus use others that you think might help you identify effective management skills. The purpose of these interviews is to give you a chance to learn about critical managerial skills from those who have to use them.

Please treat the interviews as confidential. The names of the individuals do not matter—only their opinions, perceptions, and behaviors. Assure the managers that no one will be able to identify them from their responses. Keep written notes of your interviews. These notes should be as detailed as possible so you can reconstruct the interviews later. Be sure to keep a record of each person's job title and a brief description of his or her organization.

1. Please describe a typical day at work. What do you do all day?

2. What are the most critical problems you face as a manager?

3. What are the most critical skills needed to be a successful manager in your line of work?

4. What are the major reasons managers fail in positions like yours?

5. What are the outstanding skills or abilities of other effective managers you have known?

6. If you had to train someone to replace you in your current job, what key abilities would you focus on?

7. On a scale of 1 (very rarely) to 5 (constantly), please rate the extent to which you use the following skills or behaviors during your workday:

<p>_____ Managing personal time and stress</p> <p>_____ Facilitating group decision-making</p> <p>_____ Creative problem-solving</p> <p>_____ Articulating an energizing vision</p> <p>_____ Managing conflict</p> <p>_____ Gaining and using power</p> <p>_____ Delegating</p> <p>_____ Active listening</p> <p>_____ Conducting interviews</p> <p>_____ Building teams and teamwork</p> <p>_____ Conducting meetings</p>	<p>_____ Fostering continuous improvement and quality</p> <p>_____ Making analytical decisions</p> <p>_____ Using interpersonal communication skills</p> <p>_____ Motivating others</p> <p>_____ Capitalizing on your self-awareness</p> <p>_____ Facilitating organizational change</p> <p>_____ Setting specific goals and targets</p> <p>_____ Empowering others</p> <p>_____ Giving speeches or presentations</p> <p>_____ Defining and/or solving complex problems</p> <p>_____ Negotiating</p>
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SSS Software In-Basket Exercise

NOTE: *The SSS Software exercise is used with permission. Copyright © 1995 Susan Schor, Joseph Seltzer, and James Smither. All rights reserved.*

One way to assess your own strengths and weaknesses in management skills is to engage in an actual managerial work experience. The following exercise gives you a realistic glimpse of the tasks faced regularly by practicing managers. Complete the exercise, and then compare your own decisions and actions with those of classmates.

SSS Software designs and develops customized software for businesses. It also integrates this software with the customer's existing systems and provides system maintenance. SSS Software has customers in the following industries: airlines, automotive, consumer products, electronics, finance/banking, government, and health/hospital. The company has also begun to generate important international clients. These include the European Airbus consortium and a consortium of banks and financial firms based in Kenya.

SSS Software has grown rapidly since its inception eight years ago. Its revenue, net income, and earnings per share have all been above the industry average for the past several years. However, competition in this technologically sophisticated field has grown very rapidly. Recently, it has become more difficult to compete for major contracts. Moreover, although SSS Software's revenue and net income continue to grow, the rate of growth declined during the last fiscal year.

SSS Software's 250 employees are divided into several operating divisions, with employees at four levels: nonmanagement, technical/professional, managerial, and executive. Non-management employees take care of the clerical and facilities support functions. The Technical/Professional staff performs the core technical work for the firm. Most Managerial employees are group managers who supervise a team of Technical/Professional employees working on a project for a particular customer. Staff who work in specialized areas such as finance, accounting, human resources, nursing, and law are also considered Managerial employees. The Executive level includes the 12 highest-ranking employees at SSS Software. An organization chart in Figure 3 illustrates SSS Software's structure. There is also an Employee Classification Report that lists the number of employees at each level of the organization.

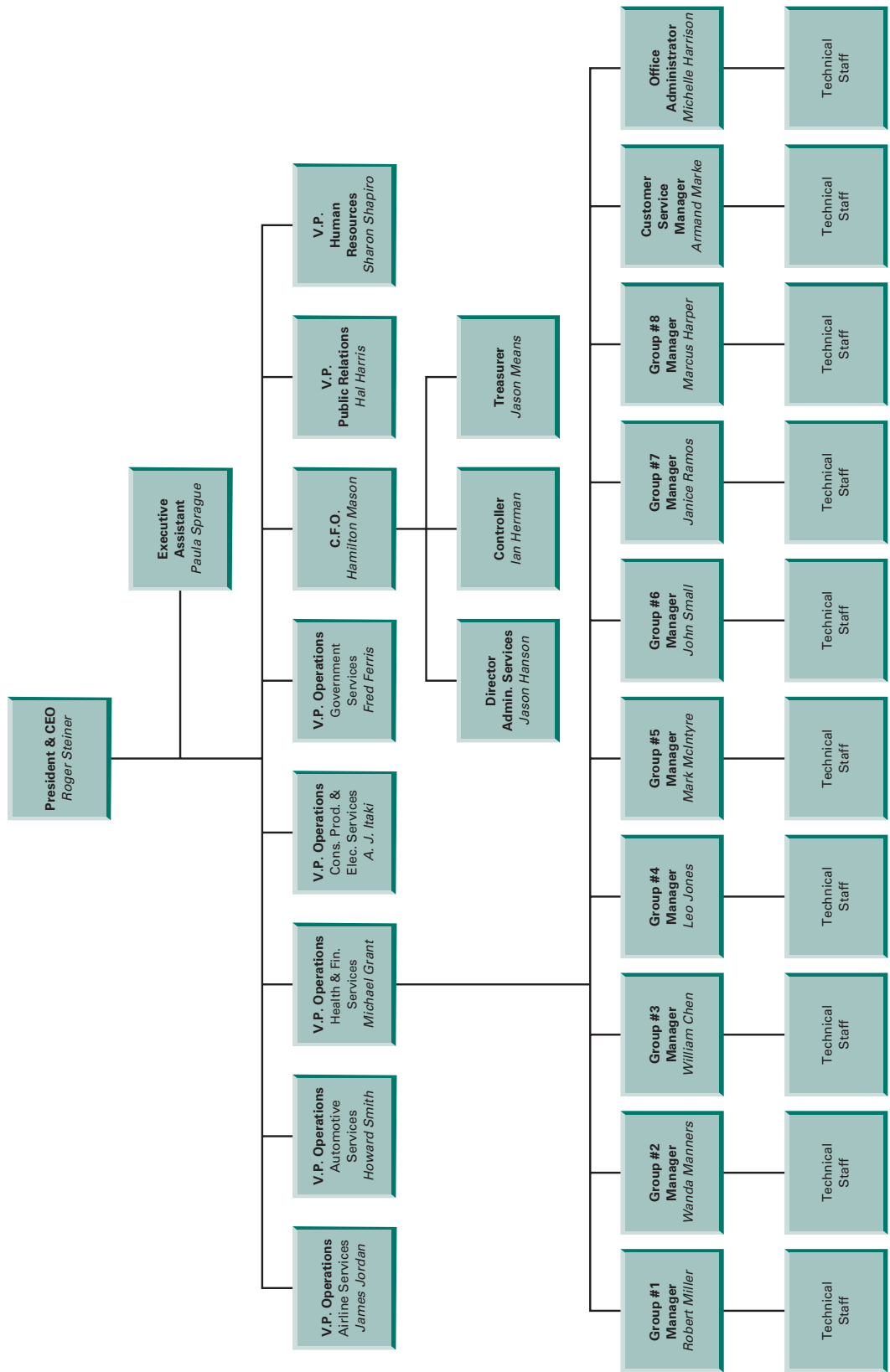
In this exercise, you will play the role of Chris Perillo, vice president of operations for Health and Financial Services. You learned last Wednesday, October 13, that your predecessor, Michael Grant, had resigned and gone to Universal Business Solutions Inc. You were offered his former job, and you accepted it. Previously, you were the Group Manager for a team of 15 software developers assigned to work on the Airbus consortium project in the Airline Services Division. You spent all of Thursday and Friday and most of the weekend finishing up parts of the project, briefing your successor, and preparing for an interim report you will deliver in Paris on October 21.

It is now 7:00 a.m. Monday and you are in your new office. You have arrived at work early so you can spend the next two hours reviewing material in your in-basket (including some memos and messages to Michael Grant), as well as your voicemail and email. Your daily planning book indicates that you have no appointments today or tomorrow but will have to catch a plane for Paris early Wednesday morning. You have a full schedule for the remainder of the week and all of next week.

Assignment

During the next two hours, review all the material in your in-basket, as well as your voicemail and email. Take only two hours. Using the response form below as a model, indicate how you want to respond to each item (that is, via letter/memo, email, phone/voicemail, or personal meeting). If you decide not to respond to an item, check "no

Figure 3 Partial Organization Chart of Health and Financial Services Division



response” on the response form. All your responses must be written on the response forms. Write your precise, detailed response (do not merely jot down a few notes). For example, you might draft a memo or write out a message that you will deliver via phone/voicemail. You may also decide to meet with an individual (or individuals) during the limited time available on your calendar today or tomorrow. If so, prepare an agenda for a personal meeting and list your goals for the meeting. As you read through the items, you may occasionally observe some information that you think is relevant and want to remember (or attend to in the future) but that you decide not to include in any of your responses to employees. Write down such information on a sheet of paper titled “note to self.”

Sample Response Form

Relates to:

Memo # _____ Email # _____ Voicemail # _____

Response form:

<input type="checkbox"/> Letter/Memo	<input type="checkbox"/> Meet with person (when, where)
<input type="checkbox"/> Email	<input type="checkbox"/> Note to self
<input type="checkbox"/> Phone call/Voicemail	<input type="checkbox"/> No response



ITEM 1 – EMAIL

TO: All Employees
FROM: Roger Steiner, Chief Executive Officer
DATE: October 15

I am pleased to announce that Chris Perillo has been appointed as Vice President of Operations for Health and Financial Services. Chris will immediately assume responsibility for all operations previously managed by Michael Grant. Chris will have end-to-end responsibility for the design, development, integration, and maintenance of custom software for the health and finance/banking industries. This responsibility includes all technical, financial, and staffing issues. Chris will also manage our program of software support and integration for the recently announced merger of three large health maintenance organizations (HMOs). Chris will be responsible for our recently announced project with a consortium of banks and financial firms operating in Tanzania. This project represents an exciting opportunity for us, and Chris’s background seems ideally suited to the task.

Chris comes to this position with an undergraduate degree in computer science from the California Institute of Technology and an MBA from the University of Virginia. Chris began as a member of our technical/professional staff six years ago and has most recently served for three years as a Group Manager supporting domestic and international projects for our airlines industry group, including our recent work for the European Airbus consortium.

I am sure you all join me in offering congratulations to Chris for this promotion.



ITEM 2 – EMAIL

TO: All Managers
FROM: Hal Harris, Vice President, Community and Public Relations
DATE: October 15

For your information, the following article appeared on the front page of the business section of Thursday's *Los Angeles Times*.

In a move that may create problems for SSS Software, Michael Grant and Janice Ramos have left SSS Software and moved to Universal Business Solutions Inc. Industry analysts see the move as another victory for Universal Business Solutions Inc. in their battle with SSS Software for share of the growing software development and integration business. Both Grant and Ramos had been with SSS Software for over seven years. Grant was most recently Vice President of Operations for all SSS Software's work in two industries: health and hospitals, and finance and banking. Ramos brings to Universal Business Solutions Inc. her special expertise in the growing area of international software development and integration.

Hillary Collins, an industry analyst with Merrill Lynch, said, "The loss of key staff to a competitor can often create serious problems for a firm such as SSS Software. Grant and Ramos have an insider's understanding of SSS Software's strategic and technical limitations. It will be interesting to see if they can exploit this knowledge to the advantage of Universal Business Solutions Inc."



ITEM 3 – EMAIL

TO: Chris Perillo
FROM: Paula Sprague, Executive Assistant to Roger Steiner
DATE: October 15

Chris, I know that in your former position as a Group Manager in the Airline Services Division, you probably have met most of the Group Managers in the Health and Financial Services Division, but I thought you might like some more personal information about them. These people will be your direct reports on the management team.

Group #1: Bob Miller, 55-year-old white male, married (Anna) with two children and three grandchildren. Active in local Republican politics. Well regarded as a "hands-off" manager heading a high-performing team. Plays golf regularly with Mark McIntyre, John Small, and a couple of V.P.s from other divisions.

Group #2: Wanda Manners, 38-year-old white female, single with one school-age child. A fitness "nut" has run in several marathons. Some experience in Germany and Japan. Considered a hard-driving manager with a constant focus on the task at hand. Will be the first person to show up every morning.

Group #3: William Chen, 31-year-old male of Chinese descent, married (Harriet), two young children from his first marriage. Enjoys tennis and is quite good at it. A rising star in the company, he is highly respected by his peers as a "man of action" and a good friend.

Group #4: Leo Jones, 36-year-old white male, married (Janet) with an infant daughter. Recently returned from paternity leave. Has traveled extensively on projects, since he

speaks three languages. Has liked hockey ever since the time he spent in Montreal. Considered a strong manager who gets the most out of his people.

Group #5: Mark McIntyre, 45-year-old white male, married (Mary Theresa) to an executive in the banking industry. No children. A lot of experience in Germany and Eastern Europe. Has been writing a mystery novel. Has always been a good “team player,” but several members of his technical staff are not well respected and he hasn’t addressed the problem.

Group #6: John Small, 38-year-old white male, recently divorced. Three children living with his wife. A gregarious individual who likes sports. Spent a lot of time in Mexico and Central America before he came to SSS Software. Recently has been doing mostly contract work with the federal government. An average manager; has had some trouble keeping his people on schedule.

Group #7: This position vacant since Janice Ramos left. Roger thinks we ought to fill this position quickly. Get in touch with me if you want information on any in-house candidates for any position.

Group #8: Marcus Harper, 42-year-old African American, married (Tamara) with two teenage children. Recently won an award in a local photography contest. Considered a strong manager who gets along with peers and works long hours.

Customer Service: Armad Marke, 38-year-old male, divorced. A basketball fan. Originally from Armenia. Previously a Group Manager. Worked hard to establish the Technical Services Phone Line, but now has pretty much left it alone.

Office Administrator: Michelle Harrison, 41-year-old white female, single. Grew up on a ranch and still rides horses whenever she can. A strict administrator.

There are a number of good folks here, but they don’t function well as a management team. I think Michael played favorites, especially with Janice and Leo. There are a few cliques in this group and I’m not sure how effectively Michael dealt with them. I expect you will find it a challenge to build a cohesive team.



ITEM 4 – EMAIL

TO: Chris Perillo
FROM: Wanda Manners, Group 2 Manager
DATE: October 15

Confidential and Restricted

Although I know you are new to your job, I feel it is important that I let you know about some information I just obtained concerning the development work we recently completed for First National Investment. Our project involved the development of asset management software for managing their international funds. This was a very complex project due to the volatile exchange rates and the forecasting tools we needed to develop.

As part of this project, we had to integrate the software and reports with all their existing systems and reporting mechanisms. To do this, we were given access to all of their existing software (much of which was developed by Universal Business Solutions Inc.). Of course, we signed an agreement acknowledging that the software to which we were

given access was proprietary and that our access was solely for the purpose of our system integration work associated with the project.

Unfortunately, I have learned that some parts of the software we developed actually “borrow” heavily from complex application programs developed for First National Investment by Universal Business Solutions Inc. It seems obvious to me that one or more of the software developers from Group 5 (that is, Mark McIntyre’s group) inappropriately “borrowed” algorithms developed by Universal Business Solutions Inc. I am sure that doing so saved us significant development time on some aspects of the project. It seems very unlikely that First National Investment or Universal Business Solutions Inc. will ever become aware of this issue.

Finally, First National Investment is successfully using the software we developed and is thrilled with the work we did. We brought the project in on time and under budget. You probably know that they have invited us to bid on several other substantial projects.

I’m sorry to bring this delicate matter to your attention, but I thought you should know about it.



ITEM 5A – EMAIL

TO: Chris Perillo
FROM: Paula Sprague, Executive Assistant to Roger Steiner
DATE: October 15
RE: Letter from C.A.R.E. Services (copies attached)

Roger asked me to work on this C.A.R.E. project and obviously wants some fast action. A lot of the staff are already booked solid for the next couple of weeks. I knew that Elise Soto and Chu Hung Woo have the expertise to do this system and when I checked with them, they were relatively free. I had them pencil in the next two weeks and wanted to let you know. Hopefully, it will take a “hot potato” out of your hands.



ITEM 5B – COPY OF FAX

*C.A.R.E.
Child and Adolescent Rehabilitative and Educational Services
A United Way Member Agency
200 Main Street
Los Angeles, CA 90230*

DATE: October 11
Roger Steiner, CEO
SSS Software
13 Miller Way
Los Angeles, CA 90224

Dear Roger,

This letter is a follow-up to our conversation after last night’s board meeting. I appreciated your comments during the board meeting about the need for sophisticated computer systems in nonprofit organizations, and I especially appreciate your generous offer of assistance to have SSS Software provide assistance to deal with the immediate problem

with our accounting system. Since the board voted to fire the computer consultant, I am very worried about getting our reports done in time to meet the state funding cycle.

Thanks again for your offer of help during this crisis.

Sincerely yours,

Janice Polocizwic

Janice Polocizwic
Executive Director



ITEM 5C – COPY OF A LETTER

SSS SOFTWARE
13 Miller Way
Los Angeles, CA 90224
DATE: October 12
Janice Polocizwic
Executive Director, C.A.R.E. Services
200 Main Street
Los Angeles, CA 90230

Dear Janice,

I received your fax of October 11. I have asked Paula Sprague, my executive assistant, to line up people to work on your accounting system as soon as possible. You can expect to hear from her shortly.

Sincerely,

Roger Steiner

Roger Steiner
cc: Paula Sprague, Executive Assistant



ITEM 6 – EMAIL

TO: Michael Grant
FROM: Harry Withers, Group 6 Technical Staff
DATE: October 12

PERSONAL AND CONFIDENTIAL

Our team is having difficulty meeting the submission deadline of November 5 for the Halstrom project. Kim, Fred, Peter, Kyoto, Susan, Mala, and I have been working on the project for several weeks, but we are experiencing some problems and may need additional time. I hesitate to write this letter, but the main problem is that our group manager, John Small, is involved in a relationship with Mala. Mala gets John's support for her ideas and brings them to the team as required components of the project. Needless to say, this has posed some problems for the group. Mala's background is especially valuable for this project, but Kim and Fred, who have both worked very hard on the project, do not want to work with her. In addition, one member of the team has been unavailable recently because of childcare needs. Commitment to the project and team morale have plummeted. However, we'll do our best to get the project finished as soon as possible. Mala will be on vacation the next two weeks, so I'm expecting that some of us can complete it in her absence.



ITEM 7 – VOICEMAIL MESSAGE

Hello, Michael. This is Jim Bishop of United Hospitals. I wanted to talk with you about the quality assurance project that you are working on for us. When Jose Martinez first started talking with us, I was impressed with his friendliness and expertise. But recently, he doesn't seem to be getting much accomplished and has seemed distant and on-edge in conversations. Today, I asked him about the schedule and he seemed very defensive and not entirely in control of his emotions. I am quite concerned about our project. Please give me a call.



ITEM 8 – VOICEMAIL MESSAGE

Hi, Michael. This is Armand. I wanted to talk with you about some issues with the technical services phone line. I've recently received some complaint letters from phone line customers whose complaints have included long delays while waiting for a technician to answer the phone, technicians who are not knowledgeable enough to solve problems, and, on occasion, rude service. Needless to say, I'm quite concerned about these complaints.

I believe that the overall quality of the phone line staff is very good, but we continue to be understaffed, even with the recent hires. The new technicians look strong, but they are working on the help line before being fully trained. Antolina, our best tech, often brings her child to work, which is adding to the craziness around here.

I think you should know that we're feeling a lot of stress here. I'll talk with you soon.



ITEM 9 – VOICEMAIL MESSAGE

Hi, Chris, it's Pat. Congratulations on your promotion. They definitely picked the right person. It's great news—for me, too. You've been a terrific mentor so far, so I'm expecting to learn a lot from you in your new position. How about lunch next week?



ITEM 10 – VOICEMAIL MESSAGE

Chris, this is Bob Miller. Just thought you'd like to know that John's joke during our planning meeting has disturbed a few of the women in my group. Frankly, I think the thing's being blown out of proportion, especially since we all know this is a good place for both men and women to work. Give me a call if you want to chat about this.



ITEM 11 – VOICEMAIL MESSAGE

Hello. This is Lorraine Adams from Westside Hospital. I read in today's *Los Angeles Times* that you will be taking over from Michael Grant. We haven't met yet, but your division has recently finished two large million-dollar projects for Westside. Michael Grant and I had some discussion about a small conversion of a piece of existing software to be compatible with the new systems. The original vendor had said that they would do

the work, but they have been stalling, and I need to move quickly. Can you see if Harris Wilson, Chu Hung Woo, and Elise Soto are available to do this work as soon as possible? They were on the original project and work well with our people.

Um...(long pause) I guess I should tell you that I got a call from Michael offering to do this work. But I think I should stick with SSS Software. Give me a call.



ITEM 12 – VOICEMAIL MESSAGE

Hi, Chris, this is Roosevelt Moore calling. I'm a member of your technical/professional staff. I used to report to Janice Ramos, but since she left the firm, I thought I'd bring my concerns directly to you. I'd like to arrange some time to talk with you about my experiences since returning from six weeks of paternity leave. Some of my major responsibilities have been turned over to others. I seem to be out of the loop and wonder if my career is at risk. Also, I am afraid that I won't be supported or seriously considered for the opening created by Janice's departure. Frankly, I feel like I'm being screwed for taking my leave. I'd like to talk with you this week.



ITEM 13 – EMAIL

TO: Michael Grant
FROM: Jose Martinez, Group 1 Technical Staff
DATE: October 12

I would like to set up a meeting with you as soon as possible. I suspect that you will get a call from Jim Bishop of United Hospitals and want to be sure that you hear my side of the story first. I have been working on a customized system design for quality assurance for them using a variation of the J-3 product we developed several years ago. They had a number of special requirements and some quirks in their accounting systems, so I have had to put in especially long hours. I've worked hard to meet their demands, but they keep changing the ground rules. I keep thinking, this is just another J-3 I'm working on, but they have been interfering with an elegant design I have developed. It seems I'm not getting anywhere on this project. Earlier today, I had a difficult discussion with their Controller. He asked for another major change. I've been fighting their deadline and think I am just stretched too thin on this project. Then Jim Bishop asked me if the system was running yet. I was worn out from dealing with the Controller, and I made a sarcastic comment to Jim Bishop. He gave me a funny look and just walked out of the room.

I would like to talk with you about this situation at your earliest convenience.



ITEM 14 – EMAIL

TO: Chris Perillo
FROM: John Small, Group 6 Manager
DATE: October 15

Welcome aboard, Chris. I look forward to meeting with you. I just wanted to put a bug in your ear about finding a replacement for Janice Ramos. One of my technical staff, Mala Abendano, has the ability and drive to make an excellent group manager. I have encouraged her to apply for the position. I'd be happy to talk with you further about this, at your convenience.