Managing to Excel

Developing a Foundation of Managerial Competencies

Excel is a collection of 12 half-day off-the-shelf workshops, each dedicated to the development of a single critical competency. These 12 competencies group in four distinct clusters:

Administrative Cluster: *Managing Your Job*
Communication Cluster: *Relating to Others*
Supervisory Cluster: *Building the Team*
Cognitive Cluster: *Thinking Clearly*

Development of the *MAP/Excel* Competency Model

Dr. Scott Parry, founder of Training House, Inc. and 1999 inductee into the HRD Hall of Fame, developed this competency framework by first analyzing the results of a series of large competency studies conducted by a number of major U.S. corporations. These studies were conducted to determine which competencies highly effective managers and supervisors possess to a greater degree than average performers. The 12 competencies selected for inclusion in the *Excel* series were identified by all these studies. They are fundamental building blocks for becoming an effective manager and are preconditions for effective leadership.

Implicit in Dr. Parry's approach for developing managerial excellence is his requirement for how a competence is defined. Competencies are a "group of related skills, knowledge, and attitudes that correlate with success in one's job and *can be improved through training.*"

INSTRUCTIONAL METHOD

The instructional design of the *Excel* workshops is based on several important principles of adult learning:

Adults learn best when:

- they focus on real world problems and can see how learning will be applied.
- learning is related to past experiences and goals.
- there is discussion and debate.
- learners are encouraged to use one another as resources.

Learning Objectives for each competency focus on the attainment of new knowledge, attitudes, and skills. These behaviors are learned, practiced, displayed and evaluated during training through experiential activities that include hands-on exercises, role plays, script analyzes, games, and self inventories. Learning objectives support a central behavioral model for successful mastery of the competency.

Action Plan:

Every workshop participant creates an individual action plan shared with their managers, work team, and stakeholders. This is the vehicle for transferring learning to the workplace. The planning focuses on performance criteria: the application of competencies to organizational problems and situations. *Excel* has been designed to provide training that leads to "terminal behavior change" or in layman's terms, learning that will be applied on the job.

Instructional Materials

Each *Excel* workshop includes:

- Instructor's Guide: The Instructors Guide bases the detailed lesson plans and content on learning objectives. Participants interact in activities and discuss information presented in the workbook.

- Power Point Presentation: Slides provide the instructor with an easy-to-use, flexible way to liven lectures and discussions.

- Video: Short video segments from a comprehensive video-based assessment are used to simulate the 12 *Excel* competencies being used. This assessment called *MAP*, *Managerial Assessment of Proficiency* was developed concurrently with *Excel* to target training in these 12 competencies in addition to providing information about a manager's personal style, communication style, and managerial style. Film sequences show managers using both incorrect and correct techniques related to the *Excel* competency. Participants evaluate and discuss the techniques observed.

- Participant Workbook: Workbooks provide learners with additional lesson content, as well as experiential activities, handouts, and action-planning forms required to complete the course.

Train-the-Trainer: A nationwide network of professional Training House Associates is available to deliver *Excel* workshops or provide training for your internal training staff.

What Can be Accomplished in a Half-Day of Training?

A manager's time is precious. Too often, formal training tries to accomplish too much. *Managing to Excel* works from the premise that if training is to succeed, learning objectives need to concentrate on just a few key behavioral change goals.

THE LEARNING OBJECTIVES

THINKING CLEARLY

Thinking Clearly and Analytically
- Recognize differences in right-brain and left-brain thinking.
- Use a systematic thinking model to analyze a situation, conclusion, or decision.
- Pinpoint the underlying reasons behind a situation, conclusion, or decision.
- Evaluate all information and assumptions for clarity, completeness, and validity.
- Draw logical conclusions based on evidence.
- Recognize the role of values in the interpretation and acceptance of information or conclusions.

Making Decisions, Weighing Risks
- Distinguish between problem solving and decision making.
- Analyze a situation for limits, desirables, options, and risks.
- Identify when and how to involve others in decision making
- Complete a decision matrix.
- Use a 10-step decision-making process to specify desired outcomes, determine criteria, select and evaluate alternatives, assess risk, and draw up an implementation plan.

Identifying and Solving Problems
- Follow a four-step problem-solving model.
- Use appropriate problem-solving tools to work a problem through each step in the problem-solving process.

BUILDING THE TEAM

Training, Coaching, and Delegating
- Apply a model of employee development to match the right leadership approach to the employee's performance level.
- Follow a systematic process for training employees on the job.
- Employ three key coaching activities to build employee confidence and support continued growth.
- Give appropriate feedback to encourage desired performance and correct undesirable behavior.
- Plan for delegating work assignments to employees.

Appraising People and Performance
- Analyze an employee's performance.
- Develop strategies for responding to difficult appraisal situations.
- Plan and conduct an appraisal meeting.

Disciplining and Counseling
- Identify effective counseling behaviors.
- Use a planning tool to prepare for a counseling discussion.
- Follow a 5-step process to conduct a counseling discussion.
- Explain three levels of disciplinary action.

RELATING TO OTHERS

Getting Unbiased Information
- Apply the ABC's of communications (Aim, Bias, and Climate) that lead to getting accurate and complete information from others.
- Use a tool for planning to get information that is accurate and complete.
- Probe to get complete and accurate information from others.
- Use reacting skill to create and maintain a positive climate for the sharing of information.

Giving Clear Information
- Evaluate communication effectiveness in terms of Aim, Bias, and Climate.
- Follow a 5-step model to plan for and conduct effective interactions.
- Plan for communicating effectively back on the job.

Listening and Organizing
- Create a mental outline of key points as you listen.
- Distinguish fact from opinion.
- Neutralize "loaded" statements.
- Use the active listening skills of probing, steering, and summarizing to listen effectively.

MANAGING YOUR JOB

Time Management and Prioritizing
- Define your key responsibilities in helping to achieve organizational goals.
- Identify strategies for reducing or eliminating common time wasters.
- Plan and organize work in order to gain control of your time.

Setting Goals and Standards
- Identify the performance, standards, and benefit your goals.
- Develop standards related to quantity, quality, timeliness, and cost/resources.
- Apply five criteria for writing effective goal statements.
- Develop an action plan for achieving your goals.
- Follow a process for sharing your action plans with employees.
- Assess sources of potential resistance to setting goals in your organization.

Planning and Scheduling Work
- Identify elements of effective planning and scheduling.
- Use a work breakdown structure to identify major elements, tasks, and subtasks of a project.
- Use a Gantt chart to schedule work.
- Use a work responsibility chart to assign work to employees.

Contact: