

# Introduction

For reasons such as competitiveness, profitability, and other measures of organizational effectiveness or success, organizations around the world strive to significantly increase the performance of workers, supervisors, managers, units, and the entire organization. The following four scenarios are typical of the concerns of top management and the subordinate managers who are charged with improving personnel's performance-related knowledge, skills, motivation, attitudes, and behavior.

*Vignette 1:* The XYZ corporation is experiencing explosive growth. One limitation on future growth is the organization's ability to train a sufficient number of qualified people to serve as managers. The leaders of the organization prefer to promote from within. The question is how to establish a practical, long-term approach to management development to meet the organization's needs for trained managers. How should the leaders of the company meet this business need? What should the manager of the organization's management and organization development group recommend to top management?

*Vignette 2:* A newly hired training director in a medium-sized company has been asked to formulate and implement a practical management development program for the organization. The organization's leaders have tried sending their people to public seminars and universities for various management and executive development programs, but they have not been satisfied with the rather insignificant and short-lived results. Some are keenly aware of the research that indicates that less than 10 percent of off-the-job training translates into changed behavior back on the job. Their mandate is that the training must be practical and must transfer from short-term off-the-job learning experiences to long-term on-the-job results. What should the training director do?

*Vignette 3:* The vice president of human resources for a large company has been asked to establish and implement a leadership program that will meet the organization's needs for future talent. Research on the company's workforce indicates that about 40 percent of the senior

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executives and about 25 percent of the company's middle managers will be eligible for retirement over the next few years. At present, no formal training is offered to supervisors or middle managers in the company, and the company's approach to management development might best be characterized as "hit or miss" and "on again, off again." What should be done?

*Vignette 4:* Top management is concerned about not only improving performance throughout the organization but also dealing with attitudes, structures, systems, and outside forces that affect personnel's performance. Having heard about management training, organization development, and change management programs, the executives are looking to their vice president of human resources to design and implement a project that covers all the bases. What should that project involve?

Do these situations sound familiar? If so, your organization may need to adopt a more organized approach to management, leadership, and organization development. How would you propose to solve the problems or deal with the issues posed by the vignettes? Your answers, of course, would depend on your own organization's needs, several of which this book is aimed at fulfilling.

### UNFULFILLED NEEDS OF ORGANIZATIONS

This book has been written as both a guide and a resource for those who directly influence the development of organizations and their personnel: management training program developers; management trainers; managers of management development (MD) and organization development (OD) groups; executive developers; OD consultants; and managers themselves. It addresses several of these people's unfulfilled or only partially fulfilled needs:

- More complete integration of the two worlds of management training/development programs and organization development/change projects
- A managerial style model that integrates aspects of various models
- Synthesis of competing "one best managerial style" theories and situational (contingency) theories
- More explicit integration of management concepts, processes, models, and practices

#### Better Integration of Training/Development Programs and Change Management or Organization Development Projects

**The Management Training and Development World.** For many years, organizations have recognized that managerial development is important. Managers have an impact on organizational performance that goes beyond their own individual performance. What they do affects personnel throughout the organization, and their decisions affect the organization's ability to meet its strategic objectives; for example, the naming of a new CEO can result in the fluctuation of a company's stock price.

Investing in the development of management talent is clearly worthwhile. This is well substantiated by ASTD's (ASTD was formerly called the American Society for Training and Development) *2004 State of the Industry Report*, authored by Brenda Sugrue and Kyung-Hyun Kim, which states, "Increases in retention and employee satisfaction were most often attributed to executive, management, and career development programs, and tuition reimbursement" (p. 18).

The report also notes, “The employee group receiving the largest percentage of learning expenditure in 2003, as in 2002, was customer service employees with an average of 18 percent of the budget, followed by middle managers and production employees, both with 11 percent of the budget. An average of 28 percent of learning budgets went to managerial training, including first-line supervisors, middle managers, senior managers, and executives. An average of 10 percent of learning budgets went to executives and senior managers” (p. 9). In fact, according to *Training* magazine’s *2005 Industry Report* by Holly Dolezalek, a total of about \$21.1 billion was spent on training executives and exempt managers (up from \$19.8 billion in 2004). And in ASTD’s *2005 State of the Industry Report*, Sugrue and Kim note, “If we combine Managerial and Supervisory and Executive Development into one management category, then management becomes the area with the most learning content devoted to it” (with 17 percent in 2004 and 18 percent projected for 2005) (p. 13).

Organizational leaders invest money in developing the talent that they believe will have the greatest impact on organizational performance, and the data from the surveys indicate that managers are often at the top or close to the top of the list. Organizations have relied on developing their managers and supervisors so that they can improve workers’ performance through more effective motivation, training, and supervision. Recently, *management development* has come to be defined more broadly as any organized approach to preparing individuals to assume responsibility for supervisory oversight of hourly workers, middle management oversight of supervisors, or executive oversight of middle managers.

Over roughly forty years, management training and development (T&D) has evolved from first-generation half-day to two-day courses, to second-generation programs that are more comprehensive and more modular and last three to five days, to third-generation programs that cover topics from A to Z and are often conducted in-house, starting at the top and working down through middle managers, supervisors, and often the workforce.

Figure I.1 illustrates what organizations hoped that all of these management T&D programs could accomplish. Note that “Managerial, Supervisory, and Employee Education and Training” at the bottom of the model is the foundation for developing “More Professional (Sophisticated and Skilled) Personnel,” who, in turn, will bring about successive improvements at each higher level of the pyramid in a series of upward-rippling causes and effects.

However, even the third-generation programs were not designed to prepare participants to collaborate more effectively in an OD or change project being conducted *during* the T&D program, nor were they designed to help participants deal with other influences on their motivation, attitudes, and behavior during their training. These and other factors led to partially effective training and disappointing organizational results.

**The Change Management and Organization Development World.** Over time, practitioners and academicians came to realize that a significant percentage of T&D dollars were being wasted because efforts to develop managers, supervisors, and workers were being undermined and even negated by dysfunctional influences exerted by many major socio-technical variables that the training itself could not directly improve. Among these factors are *task-related or technological factors* such as the mechanistic (simple, routine, unfulfilling) nature of workers’ jobs; *individual variables* such as low work motivation and underdeveloped job knowledge, attitudes, and skills; *organizational variables* such as authoritarian managerial styles and hierarchical organizational structures and systems; *social phenomena* such as dysfunctional social norms (expected attitudes and behavior) in work groups; and destabilizing *outside forces* such as rapidly evolving

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**Figure I.1. Training Foundations of Long-Term Organizational Success**

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technologies and constantly changing marketplaces. As a result, organization development emerged, and consultants began performing change management projects and consultant-guided organization development interventions, both of which are aimed at better dealing with socio-technical influences either directly or indirectly. For those who may not be familiar with these approaches, they are briefly described here.

*Change management projects* are often conducted by large consulting firms for very large companies or organizations. The consultants act as experts and change agents. They collect and analyze information and ideas elicited from appropriate organizational personnel and then feed back observations, conclusions, and recommended solutions, much as doctors do for their patients.

This approach has one great advantage. Most often, it involves the collection and analysis of information on all major functional areas: marketing, research and development, operations (production), information systems, finance, and human resources. In other words, it involves the kinds of analyses that should be inputs to a strategic or long-range planning process. It has two underlying assumptions: First, not only are there problems that have been identified, but there are also many unidentified problems and many unrecognized opportunities to improve numerous operational variables. Second, detailed analyses and planning regarding major operating units should be performed first—and then should be used as inputs in order to (a) design or redesign supportive organizational structures, systems, and processes and (b) improve motivational, attitudinal, behavioral, interactional, and performance factors that influence operational effectiveness and efficiency.

The change management approach also has a widely recognized disadvantage: because personnel do not actually participate in consultants' analytic and planning processes, they often do not buy into consultants' recommendations. As a result, they often do not adopt or implement those recommendations as enthusiastically and conscientiously as they would if they were their own.

*Consultant-led OD interventions* are often conducted for midsize and small organizations that cannot afford full-blown change projects. Often, believing that they have already identified their own basic problems and suspecting that those problems are somehow being caused by people and their relationships with the organization, executives hire an outside OD consultant to lead a problem-solving intervention. Although the steps in OD intervention processes are virtually the same as in change projects, there are at least two basic differences between the two approaches. First, although the consultant is the primary change agent, he or she emphasizes engaging all personnel in a *jointly owned effort* to solve organizational problems. Second, the OD consultant generally focuses on organizational and behavioral phenomena. Sometimes, however, like the change management consulting firms, the OD consultant will conduct in-depth, business-oriented analyses that are inputs to better organizational goal setting and planning. (For a more thorough description of this type of project, see Rothwell and Sullivan, 2005.)

While both types of projects involve managerial, supervisory, and even workforce personnel to varying extents, the consultants usually recommend that the project be *followed* with (rather than designed around) an education and training program for managers and supervisors.

So up to this point, there have been management training programs on one hand and consultant-performed organization development or change management interventions on the other.

*Need:* A project is needed that bridges the gap between T&D and OD by fully incorporating a management development program for managers and supervisors into an organization development or change project, creating a more effective *integrated MD/OD project*. This book

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outlines a next generation MD/OD project that fulfills that need by presenting a management education and development program that serves as the centerpiece and vehicle for more effective overall organization development and change.

### A Managerial Style Model that Integrates Aspects of Various Models

Many managers are confused about managerial and leadership styles because management theorists have described and explained managerial behavior in so many different ways. Douglas M. McGregor (1957) described managerial styles in terms of two different types of perceptions of subordinates; Robert R. Blake, Jane S. Mouton, and Alvin C. Bidwell (1962) described them in terms of combinations of levels of concern for productivity and concern for people; the Training House division of HRD Press (2000) described them in terms of task-related competencies and people-related competencies; and Paul G. Hersey and Kenneth H. Blanchard (1969) described them in terms of combinations of levels of task behaviors and people behaviors. In other words, some have dealt only with motivational aspects, some have dealt only with competencies or capabilities, and others have dealt only with behaviors. And virtually all have described and explained styles in terms of only two of those three elements.

However, managerial, leadership, and supervisory styles are most effectively described and explained by referring to all three elements—motives and attitudes, capabilities (or competencies), and behavior patterns. For example, regardless of their levels of people-related competencies, managers tend not to perform well in people-related areas unless they have relatively high levels of the motivating people-oriented concerns or attitudes (underlain by people-oriented values and personality traits) that prompt them to actually *apply* their capabilities. Conversely, if they have the people-oriented motivation but not the requisite people-related skills, they cannot be fully effective when dealing with people. One reason that management styles have not been described in terms of all three elements is that researchers have had some difficulty using trait theory (from clinical psychology) to explain managerial and leadership styles. Even today, we aren't aware of any business school program in which styles are discussed in terms of all these characteristics: motive/attitudinal forces such as needs, drives, and values; personality traits, which can reflect motives and attitudes and can also constitute competencies; and specific mental and social capabilities (or competencies). Therefore, very few management trainers and OD consultants can fully (a) appreciate how difficult it is to change people's basic style; (b) understand why managers frequently revert to their old style, regardless of intensive training; or (c) understand how to influence managerial styles throughout an organization more successfully. And without this understanding, they cannot design, deliver, and guide the most effective and successful management and organization development projects.

*Need:* To help better describe, explain, understand, and further develop or improve the behavior and performance of managers, supervisors, and leaders throughout an organization, a model that deals with all three elements would be very useful. Such a model, The Managerial Target®, is described in this book. It is the first model to relate particular managerial or leadership styles to *four trait-related dimensions*: task-oriented motive/attitudinal traits; task-related capabilities and behaviors; people-oriented motive/attitudinal traits; and people-related capabilities and behaviors.

### Synthesis of Competing “One Best Managerial/Leadership Style” Theories and Situational or Contingency Theories

Many managers are also confused as to which managerial or leadership style (or styles) are most effective. Early managerial style theorists essentially said that there is one best style.

McGregor (1957) proposed Theory Y (a team or participative style) over Theory X (an authoritarian style). Robert Tannenbaum and Warren H. Schmidt (1958) asserted that a middle-of-the-road style provides a reasonable balance between the authoritarian style (at one end of a spectrum) and the permissive style (at the opposite end). Most theorists came to believe that the best or most effective style is one that emphasizes both productivity and people (a team or participative style), as did Blake and Mouton (1964), who were proponents of the 9,9 style on their Managerial Grid®. Similarly, Rensis Likert (1975) proposed his System 4, and William G. Ouchi (1981) and Ouchi and Jaeger (1978) proposed their Theory Z (and Type Z organizations). Many others basically agreed.

However, largely influenced by research on the natures of people's various tasks (ranging from mechanistic at one end of a spectrum to organic at the other end), contingency theorists began to assert that there is no one best style and that one must use different styles to deal with different situations. Among the first of these were Tom Burns and G. M. Stalker (1961), Fred E. Fiedler (1963), and Paul R. Lawrence and Jay W. Lorsch (1967). The Ohio State model, another two-dimensional model, eventually led to Hersey and Blanchard's development of their widely used Situational Leadership model (Hersey and Blanchard, 1969).

*Need:* A framework for reconciling "one best style" theories with situational (contingency) theories should be provided. It would help resolve confusion as to which of the two points of view is superior if the best aspects of both could be integrated. Put another way, it is necessary to merge the two separate tracks onto one coherent track. The model in Chapter Eleven has been designed to accomplish that.

### **More Explicit Integration of Management Concepts, Processes, Models, and Practices**

Management theories, concepts, models, methods, techniques, and practices, all meant to help managers solve problems, have been proliferating for years. But all these pieces of the management puzzle have been piling up willy-nilly. Today, managers and those who educate them are virtually drowning in management information because they have no framework for interrelating all the pieces and putting them together into a completed puzzle. Without such a framework, how can managers apply what they have learned in anything but a relatively piecemeal and ineffective manner? Management educators and the managers, supervisors, and workers they teach need to recognize that more effectively dealing with mountains of problems, managing change, managing time, and just plain managing *everything* involve using the analytic approach to problem solving within a team or participative atmosphere. Indeed, very few managers have been shown that (a) planning, problem solving, decision making, managing change, managing time, communicating, and learning are all essentially the same process (if done really well) and (b) when we perform one process, we are also performing several, if not all of the others. Neither have managers been shown how to maximize the effectiveness of these processes by using what they have learned about each to improve, integrate, leverage, and maximize them all.

*Need:* Managers—and certainly practitioners in management development and organization development—need a framework that finally fits all the disjointed jigsaw pieces of management together into a big picture. In effect, they need a visual model that will help them interrelate, integrate, and apply what they already know and then help them better assimilate and apply whatever else they subsequently learn. This book describes what a number of individuals in the

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academic and business communities have said is the first unified (highly integrated) model that shows how to use many major pieces (individual concepts, processes, models, and practices) either together or in sequence so as to maximize their benefits.

### BASIC DESCRIPTION OF THE BOOK AND ITS PURPOSES

This one book aims to fulfill in a smoothly integrated manner all four of the needs just described—the need for (1) a roadmap or template for designing more integrated MD/OD projects; (2) a managerial style model that integrates aspects of many different models; (3) a more synthesized approach for managing people; and (4) greater integration and synthesis of many important management concepts, models, and practices.

#### The Contents and Their Structure

The core of the book is a comprehensive, innovative, fully integrated management education and training program that has been used with extraordinary success and has earned in-house program participants as many as twelve college credits or credits toward an MBA. The parts of the book often alternate between think-work processes and behavioral phenomena. The organization of the book is now described in detail.

Chapter One is a preview of the book's next generation MD/OD project—an OD project built around and integrated with an MD program. Parts One through Seven constitute the management education and development program.

Part One, which consists of Chapters Two through Seven, deals with the management functions and processes that are the most basic responsibilities of managers. It provides an overall framework or context for covering topics in the remaining parts of the book. Chapter Two presents an overview of the managerial (or integrative) process and its component functions. It contains the managerial process model that is the core model and the common denominator that ties together management, problem-solving, decision-making, communication, and learning processes and practices into the final Unified Practice of Management model. Chapter Three discusses the analysis phase of the managerial process. Chapter Four begins by putting planning phase functions into perspective and then goes on to outline more specific goal-setting, programming/planning, and budgeting principles and practices. Chapter Five describes decision-making principles, methods, and practices. Chapter Six covers the implementation functions of management: organizing, staffing, guiding activities, and reporting and evaluating results. Chapter Seven uses what was covered in the previous chapters to describe how more effectively performed management functions are key to more effective time management.

Part Two, consisting of Chapters Eight through Twelve, discusses managerial and leadership styles, which can be defined as different ways of behaving toward and interacting with subordinates in the process of carrying out management functions. Chapter Eight presents various models for describing and explaining different managerial or leadership styles. Chapter Nine describes nonpersonal influences on managers' behavior, and Chapter Ten describes personal influences. Chapter Eleven discusses an approach for synthesizing "one best style" and situational theories. Chapter Twelve discusses how nonpersonal and personal influences on managers (and all other personnel) should be dealt with in order to maximize both their personal development and organization-wide development.

Part Three, consisting of Chapter Thirteen, builds on Part One by more specifically covering principles and practices for improving individual problem solving and decision making.

Part Four, consisting of Chapters Fourteen and Fifteen, uses many of the behavioral concepts covered in Part Two to discuss interpersonal relations and skills. Chapter Fourteen provides a number of perspectives on interpersonal relations. Chapter Fifteen presents principles and practices that enable effective communication in interpersonal situations.

Part Five's Chapter Sixteen covers how to conduct team think-work in organizations. Building on the problem-solving and decision-making methods and practices in Part Three and using the behavioral principles and perspectives in Parts Two and Four, Chapter Sixteen prepares program participants to combine various knowledge factors and skills in order to better analyze and begin to solve unit and organizational problems.

Part Six is called "Learning and Other Managerial and Personal Skills." This is the point in a management development program where various skills could be further developed. Chapter Seventeen concentrates on principles and procedures for better individual and organizational learning (that is, development).

Part Seven consists of Chapter Eighteen, in which many major concepts, principles, processes, models, methods, and practices covered in the book are summarized, interrelated, and integrated within the Unified Practice of Management model.

While comprehensive, this is not just any management program that simply covers a wide range of topics. Developed over more than thirty-five years, it is a next generation program in two important respects: First, it is far more integrated than most, if not all other programs. In the end, after interrelating major concepts and models from chapter to chapter, it ties together approximately ninety of them in a powerful, state-of-the-art management system. It thereby puts what people have learned (or are learning through the book) into an overall perspective that (a) enables instructors to teach management concepts and practices more effectively and (b) helps managers use them more powerfully in their efforts to maximize both individual and organizational development and performance. Second, this program has been specifically designed to be used as a vehicle for enabling both managers and their subordinates to participate much more significantly and effectively in organization development processes.

### The Book's Objectives

The ultimate aim of this book is to help managers improve organizational long-term viability and success through systemic, organization-wide managerial, supervisory, and work group training and development.

Specific objectives can be stated in terms of the following quantifiable results, which have been achieved through the use of the program in this book and have been documented using surveys administered before, during, and after previously conducted projects.

- Achieve at least a 50 percent improvement in individual and team performance of management functions and processes
- Develop a team atmosphere (and working relationships) within one to two years
  - Bring about a 100 to 200 percent improvement in interdepartmental interactions
  - Bring about a 50 to 100 percent improvement in superior-subordinate working relationships

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The program also produces these positive results:

- Increased accountability for performance and the development of oneself and subordinates
- Increased on-the-job satisfaction and morale throughout the organization
- More significant and permanent results than many other programs
- High benefit-cost ratio (that is, the program pays for itself many times over)

### **BENEFITS OF THIS BOOK FOR PROFESSIONAL AND STUDENT AUDIENCES**

Written to serve two distinct but related audiences, this book is first and foremost a professional resource—a program development guide for management professors, executive developers, management trainers, management training program developers, managers of MD/OD functions, and OD consultants. This first group can also use the book as a teaching resource and take-away manual for the second audience—students or participants in general management education or skills development courses or seminars.

#### **Benefits for Educators and MD and OD Practitioners**

Materials developed and programs conducted over many years have evolved into this professional how-to resource for MD/OD professionals. As a matter of fact, most of the material in this book has already been used to train management trainers, training program developers, and MD/OD managers for some of the largest organizations in the world—such as IBM (Executive Development Center), AT&T, Kraft, the U.S. Naval Academy, the Navy Human Resource Management School (for Navy trainers and consultants), Baxter Labs, Walgreens, Sears, Caterpillar, Illinois Bell, and the U.S. Army Command and General Staff College. Quite a few participants from those organizations have remarked that these descriptions and explanations of managerial and organizational behavior phenomena are so clear and insightful that they often work them into their own programs.

As the book describes an integrated MD/OD project, it also accomplishes several other innovative and useful things.

First, by describing *what* should be taught and *how*, the book is a program design example or template. It either demonstrates or explains how management trainers and instructors, training program developers, and OD practitioners can do the following:

- Develop more integrated training programs from scratch
- Arrange existing training topics or materials into a building-block sequence, so that what people learn in earlier modules is (a) used to prepare them for subsequent topics, (b) constantly reinforced throughout the program, and (c) interrelated and synthesized with what is covered in subsequent modules
- Add materials to existing programs to make them more compatible with organization development
- Design MD/OD projects that more effectively integrate managerial or supervisory development practices with OD consulting practices
- Leverage T&D dollars by conducting integrated MD/OD projects that increase participants' abilities to modify many influential socio-technical forces so that those forces will all work together to reinforce development of all personnel, foster change, and improve operations

Second, the book provides many fresh and innovative instructional insights, perspectives, models, tables, and figures that are specifically designed to help instructors better explain, illustrate, interrelate, summarize, and integrate the concepts, processes, models, and practices that are being covered.

Third, the book introduces The Managerial Target<sup>®</sup>, a tool for understanding leadership styles that basically shows what Blake and Mouton's Managerial Grid<sup>®</sup> shows but also provides insights into two groups of underlying motive/attitudinal traits and two groups of capabilities and behaviors. This helps managers (a) identify their own and their subordinates' managerial or leadership style tendencies; (b) better understand and more successfully develop, influence, or otherwise improve their own and their subordinates' managerial, supervisory, and leadership behavior; and (c) estimate their own and their subordinates' possible levels of longer-term managerial or leadership success. In addition, the model helps explain what to look for when hiring managers and what to develop in managers so that they can actually behave in a highly participative, team-oriented manner. The preferred personal traits and behaviors that companies use to evaluate performance can be substituted for many Target traits in order to gain organizationally relevant insights into personnel's developmental needs.

Fourth, this book describes a managerial behavior model that reconciles and synthesizes the best aspects of "one best style" theories and situational (contingency) theories.

Fifth, the Unified Practice of Management<sup>™</sup> model at the end of this book shows MD and OD professionals, practicing managers, and students how the many pieces covered in the book—including specially designed instructional illustrations and various management schools of thought, concepts, models, functions, processes, and practices—all fit together into a consistent, coherent, enlightening whole. (This whole can also be viewed as a meta-construct made up of a number of constructs.) The model also enables managers to subsequently integrate any new concepts, methods, or practices that they might learn into a meaningful overall mental picture. Because the model integrates general management, management development and organization development, learning organizations, action learning, planning, knowledge management, change management, and related areas, it also shows managers how to *use* what they have learned in the most synergistic and powerful manner possible.

Business schools already tie together information on functional areas such as marketing, production, finance, and human resources by using computerized business games or simulations. Now, using this book's concepts, illustrations, and unified model, they can also develop capstone course modules to tie together the general management concepts, models, processes, practices, methods, and tools that they have also taught.

Sixth, for those in both human resources and information technology, the book describes two innovative learning and think-work tools that help the knowledge workers in twenty-first-century organizations more effectively manage and use information. The first is a qualitative information base for collecting, protecting, formatting, and better utilizing the qualitative or more subjective information that ordinarily resides only in personnel's heads. The second is a diagrammatic knowledge base<sup>™</sup> that enables managers and their subordinates to effectively analyze fifty to one hundred times more qualitative and quantitative information during planning, problem-solving, and decision-making processes.

### **Benefits for Students, Seminar Participants, and Practicing Managers or Leaders**

Because this book is an example of what can be taught and how, it can be used by course and seminar instructors as a comprehensive, balanced manual for students and seminar participants

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to study and discuss. In fact, various editions of the four books and six booklets from which this book is excerpted have been used as college texts and on-site organizational training materials to train thousands of students and managers, supervisors, and leaders in many types of organizations.

Students and seminar participants can benefit more from this book than from many other courses and seminars for two reasons. First, it is a not-too-textbookish survey course that covers most of the important elements of effective management. Second, it discusses, interrelates, and integrates a number of innovative insights and models that are being introduced publicly for the first time in this book.

After reading about, studying, and practicing the concepts, models, methods, principles, tools, and practices discussed in the book, course and seminar participants should be able to do the following:

- Describe, define, analyze, and understand the following in specific rather than vague or generalized terms: self, subordinates, the managerial role, managerial activities, and what is occurring within the organization and why
- With respect to major management functions (such as analyzing, planning, decision making, organizing, staffing, motivating and guiding people, evaluating results, and problem solving), identify what one is doing right, and why—in order to purposefully do it better—and identify what one could be doing better, and how
- Increase the probability that they will stop to think about what they are doing so that they will consciously and purposefully use various principles and methods most appropriately and effectively
- Be more sensitive to, better understand, and relate more effectively with others in the process of managing, supervising, leading, and collaborating
- Improve their own and their subordinates' development, productivity, and job satisfaction by further developing their own and subordinates' abilities to conceive of and adapt to change, make better use of time, and be more creative
- Further develop their own and their subordinates' abilities to learn, handle, retain, and recall information
- More readily recognize important problem-solving and learning situations
- Improve capabilities for both thought and action, and effectively balance these orientations in problem-solving and decision-making situations
- More effectively contribute to management development and organization development programs by reinforcing their own and their subordinates' further development on the day-to-day basis necessary to more effectively and permanently improve knowledge, skills, attitudes, behavior, and performance

### **HOW ALL READERS CAN GET THE MOST FROM THIS BOOK AND ITS CD-ROM**

This section provides a road map that explains the following: how parts and chapters are structured and what various sections of chapters provide for two different audiences; materials on the CD-ROM and how they supplement the text; and how best to read the book in order to get the most from it.

## The Structures and Natures of the Seven Parts and Their Chapters

Each of the seven parts of this book corresponds to one of the seven modules in the management development program. Each module consists of training sessions (based on the assigned chapters) followed by sessions during which superiors and their immediate subordinates apply what they have learned in order to more effectively plan and implement organization development and change projects.

**Introduction to Each Part.** Each part's introduction describes the part's chapter or chapters and briefly discusses what they aim to accomplish in terms of management development and organization development.

**General Nature of the Chapters.** The chapters are primarily educational materials that have been written to be understood by students and seminar participants. They survey many management topics and therefore cannot delve into these topics as deeply as do more specialized books. Instead, they "hit the tops of the waves." The chapters constitute a book that is meant to be more a manual than a textbook. Like textbooks, it covers many theories and concepts and brings graduate-level concepts, methods, and practices to participants in management seminars. However, unlike many textbooks, (a) it is more application-oriented and practical, and (b) rather than reviewing the latest research, it mostly covers the theorists and practitioners whose names have become well-known over the years, because their concepts have most significantly shaped management practices.

**Chapter Introductions.** The chapter introductions outline the following: (a) what the chapter is generally about and the specific topics to be covered; (b) what consultants, trainers, and facilitators can get out of the chapter (objectives); (c) what students, seminar participants, and practicing managers can get out of the chapter (learning or behavioral objectives); and (d) the materials included on the CD-ROM that an instructor might utilize to maximize students' or participants' learning experience.

**Structure of the Chapters' Contents.** Writing a book that might serve educators and trainers as well as those being educated or trained compelled us to weigh several considerations. First, different people in both groups have different backgrounds and widely varying levels of existing knowledge. Second, more knowledgeable readers should not be made to constantly read things they already know. Third, less knowledgeable readers must nonetheless be prepared to understand various concepts and models by being exposed to materials that are already familiar to more knowledgeable readers.

Therefore, attempting to balance such considerations, we divided most (but not all) chapters into two sections. The first section, "The Basics," very concisely reviews the essential topics that must be covered in courses and seminars. The second section, "Beyond the Basics," discusses more advanced concepts, principles, models, and methods that are not always covered in training programs but should be if students or participants are to apply the basics successfully. A chapter's "Beyond the Basics" section may also contain concepts and models that are being introduced for the first time in this book.

**Recommendations for Conducting End-of-Module Superior-Subordinates Discussion, OD Application, and Team-Building Sessions.** At the end of the last chapter in each of the seven parts of the book, there is a two- or three-page section containing recommendations on how to

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conduct that module's posttraining discussion and organization development sessions. (These sessions are further described in Chapter One.) Each of these sections (a) begins with a general discussion of what the sessions are aimed at accomplishing; (b) outlines some specific objectives; (c) briefly describes what participants should do in preparation for the sessions; (d) lists recommended topics, issues, or problems (discussion of which will apply what has been learned to improve certain groups of socio-technical influences on a unit or organization); (e) offers suggestions about commitments concerning actions and results; (f) covers matters concerning session facilitators; and (g) makes brief suggestions on session evaluation and follow-up.

### Additional Chapter-Related Materials on the CD-ROM

Getting the most from this book also involves utilizing additional resources on the CD-ROM. Due to space considerations, the chapters do not contain all the information and useful learning aids that the book might otherwise offer. The accompanying CD-ROM contains those additional materials. (There is a full list of the CD's contents at the beginning of this book and also on the CD itself.)

The materials on the CD-ROM include the following:

- *Class or seminar session preparation (study) guides.* These guides include (a) multiple-choice questions, (b) statements to be filled in, and (c) questions requiring written answers and opinions. They review and reinforce the concepts and terminology being covered. They ask students or participants to compare concepts, weigh issues, and consider how they might apply what they are learning. The study guides also encourage participants to think about what is going on in their organization, and why, as well as how they might use what they are learning to improve the many influences on their own and others' motivation, attitudes, capabilities, interpersonal interactions, work behavior, and performance.

It is important to note that this reflective activity prepares participants or students to participate more effectively in the end-of-module superior-subordinates discussion, OD application, and team-building sessions that are conducted once everyone involved in the program has covered a particular module's training materials.

- *Worksheets and tools.* In many chapters, worksheets and tools help participants (a) recognize what is occurring in an organization, (b) analyze situations, (c) consider possible solutions, and (d) make decisions. A number of these can be used during the end-of-module superior-subordinates sessions to better analyze situations, plan, formulate solutions, and make decisions regarding goals and plans.

- *Topic-related quotations.* Quotations succinctly drive home many important points raised in some chapters.

### How Best to Read the Book

This book was written to be read *sequentially*—from one chapter to the next in turn. Jumping around in this book is definitely not the way to benefit most from it; thus, we urge readers to resist the temptation to do so. The following reasons cannot be overemphasized.

First, the chapters and their topics are arranged in a building-block sequence. The concepts, models, principles, and insights covered in initial chapters help readers better understand those in subsequent chapters. For example, readers must learn what is in Chapter One in order to fully understand, assimilate, and integrate what is in Chapters Two through Seven (and later chapters). They must know what is in Chapters One through Twelve in order to fully understand and

interrelate what is in, for example, Chapters Thirteen through Seventeen. And they must know what is in Chapters One through Seventeen in order to fully understand and appreciate the unified model in Chapter Eighteen. Furthermore, every time a concept learned earlier is related to a concept being learned later, the learning of both concepts is being reinforced.

Second, some readers may want to skip over sections of the book because they believe they already know much of what there is to know on a subject. For example, some who have master's or doctoral degrees in management may want to skip over the chapters on management functions, methods, processes, tools, and practices. On the other hand, some who have master's or doctoral degrees in psychology, sociology, or educational psychology may want to skip over the chapters on "soft skills." Similarly, some management trainers and program developers may not be particularly interested in the OD aspects of the book, while some OD practitioners may not be particularly interested in the management training aspects. However, if readers skip over the things they care less about or think they already know, they are likely to miss (a) several innovative concepts and models; (b) many fresh insights; (c) a number of new and helpful ways to understand or explain various concepts, models, principles, and practices; and (d) ways to better integrate MD into OD. Furthermore, very few readers will have been exposed to The Managerial Target® or the Unified Practice of Management™ model at the end of the book.

Thus, even if readers have a solid background in most of the subjects covered in this book, they should at least skim the chapters containing seemingly familiar material and look for the fresh insights and explanations of concepts and for the innovative models being introduced. What is considered important in the book will not be too difficult to find. Important points are italicized. Important concepts are illustrated in major models (figures) and tables.

### How MD and OD Professionals Can Get the Most from This Book and Its CD-ROM

We recommend that MD/OD professionals pay particular attention to the following:

*This Introduction and Chapter One.* These map out the project and explain in general how and why the topics and OD sessions have been sequenced as they have.

*The introduction to each part and chapter of the book.* These introductions further explain (a) what each part and chapter aims to achieve with respect to organization development and (b) why each part is positioned where it is in the book. It should be noted that parts are not sequenced as they might be for management training purposes alone. They are also sequenced for organization development purposes, so that the concepts, principles, methods, practices, and skills that participants are learning are constantly reviewed, reinforced, and used over the nine to twelve months (or more) that it can take to conduct a project involving participants from a number of organizational levels. For example, behavioral topics should be covered at different points in the program rather than all being covered at one point, so that much of what is learned early in a nine- to twelve-month MD/OD project will be reinforced later and will not be forgotten by the time it can be put to use in later stages of the program.

*The end-of-module "Recommendations for Conducting Superior-Subordinates Discussion, OD Application, and Team-Building Sessions."* These recommendations outline how OD consultants or facilitators can help MD/OD program participants apply what they have just learned in order to (a) identify and improve socio-technical influences on their motivation, attitudes, behavior, interactions, practices, and performance and (b) identify and solve various individual, unit, and organizational problems (which also involve causal or influential socio-technical variables).

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**Chapters.** While the book's chapters are primarily meant to be educational materials for students and seminar participants, they should also be reviewed by MD and OD professionals. The chapters are examples of what can be taught, especially to in-house seminar participants so that they will be well-prepared to take part in the OD aspects of the book's MD/OD project. By reviewing the chapters, MD/OD professionals can better determine what participants will be able to contribute to OD activities—especially during the superior-subordinates discussion, OD application, and team-building sessions that follow each module.

**CD-ROM Materials for MD/OD Professionals.** The CD-ROM contains the following materials specifically to help MD/OD professionals facilitate their programs:

- Comparison of OC (Organizational Change), OD, and MD/OD Projects
- MD/OD Project Preparation Phase Steps and Guidelines
- Climate (Attitude) Survey
- Study of Values Conversion Table (for converting raw scores to adult percentile levels)
- Recommendations for conducting the superior-subordinates discussion, OD application, and team-building sessions following the training portion of each module (to help plan what might be discussed during those sessions).
  - Recommendations for End-of-Module 1 Superior-Subordinates sessions
  - Recommendations for End-of-Module 2 Superior-Subordinates sessions
  - Recommendations for End-of-Module 3 Superior-Subordinates sessions
  - Recommendations for End-of-Module 4 Superior-Subordinates sessions
  - Recommendations for End-of-Module 5 Superior-Subordinates sessions
  - Recommendations for End-of-Module 6 Superior-Subordinates sessions
  - Recommendations for End-of-Module 7 Superior-Subordinates sessions

**CD-ROM Materials for Course or Seminar Instructors.** The following materials will be especially useful to those who wish to use this book as a resource for a course or seminar that will earn students or participants college credits, MBA credits, or continuing education units.

- *Course syllabus.* This MS-Word document can be adapted by an instructor or seminar leader to propose and justify the course's or program's inclusion in an academic institution's curriculum. For each part and each chapter, it outlines the following: learning (behavioral) objectives; reading assignments; use of additional instructional materials (such as filling in a chapter study guide); suggestions for class or seminar design and possible learning activities; topics to be covered; and possible ways to evaluate learning progress.

- *Class or seminar session preparation (study) guides* (for the introduction and all chapters). Instructors can use these Word documents in several ways: (a) to help them plan how they will cover the chapter's materials in class or seminar sessions; (b) to provide materials for students or participants to fill in as they prepare for class or seminar sessions; and (c) to develop chapter quizzes (by editing, adding, or deleting questions).