Generic Management

Learner Guide

Module 1– Management Planning Skills

FETC Generic Management – Level 4 - SAQA ID: 57712 LP 74630

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Designed and Developed for:
Tracey McLennan

Contact: Tracey McLennan

Tel: 082 093 2416

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Key to Icons used in this book

We have used symbols (also called icons) throughout the text in this module which can help you quickly identify what you need to do. Here is an example of what each one will require you to do:

Activity

This icon indicates that you are required to complete certain activities that will assist you with your studies.

NB / Note well

This icon indicates information of particular importance.

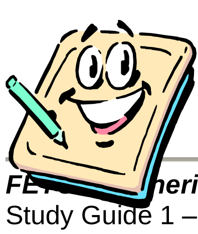
Definition

This icon indicates a clarification of a word/concept or the nature of something.

Portfolio

This icon indicates an activity that can form part of evidence for assessment.

Self-Evaluation



If you answer the self-evaluation questions indicated by this icon, you will be able to assess the degree of success you have achieved in mastering the study material.

This module comprises of the following unit standards:

SAQA ID	Unit Standard Title	Level	Credits
242817	How to solve problems, make decisions and implement solutions	4	8
242822	Employ a systematic approach to achieving objectives	4	10
242816	Conduct a structured meeting	4	5
242814	Identify and explain the core and support functions of an organization	3	6

When you have completed this manual, you will be able to:

- Define a problem.
- Investigate the problem.
- Generate problem solutions.
- Implement problem solution.
- Evaluate the effectiveness of the solution.
- Monitor the achievement of team objectives
- Specify objectives.
- Formulate a plan.
- Co-ordinate people and other resources.
- Implement the plan to meet objectives.
- Evaluate results and making corrections and improvements
- Prepare for a meeting.
- Conduct a meeting.
- Deal with differing views in a meeting.
- Identify and explain the core business of an organization
- Explain the types of work done within the various core activities of an organization
- Explain the role of a selected work unit in an organization
- Identify and explain the difference between the line and support functions

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Unit Standard 242817
Solve problems, make decisions and implement solutions

When you have completed this section, you will be able to understand and explain the following:

- Defining a problem.
- Investigating the problem.
- Generating problem solutions.
- Implementing problem solution.
- Evaluating the effectiveness of the solution

The Best Time of Day to Make a Big Decision

Science has a surprising answer

*Inc. contributing editor **Courtney Rubin** was for five years a London-based staff writer for People magazine. Rubin, a former senior writer for Washingtonian magazine, has written for the New York Times magazine, Time, Marie Claire, and other publications. She is the author of The Weight-Loss Diaries*

Wondering when's the best time of day to make a big decision? Forget the astrology charts and drink a cup of coffee—or four.

You make better decisions when you have a full bladder, or so says a study to be published in *Psychological Science*, a journal of the Association for Psychological Science.

In one experiment, researchers from the Netherlands had participants either drink five cups of water or take small sips of water from five separate cups. After about 40 minutes—the time it takes for water to reach the bladder—researchers tested the subjects' self-control. Participants were asked to make eight choices: each was between receiving instant gratifications (or near instant) versus a larger—but deferred—reward. For example, in one scenario they could opt for picking up $16 the next day or $30 in 35 days. The people with full bladders were more likely to opt for the larger rewards later. Other experiments backed up the link.

"You seem to make better decisions when you have a full bladder," said lead researcher Mirjam Tuk, of the University of Twente in the Netherlands. (*Science Daily* suggests this may be a reason for stores that count on impulse buys to allow customers to use the bathroom, "since they might be more willing to go for the television with the bigger screen when they have an empty bladder.")

It's a surprising find: Tuk wrote in the paper's abstract that psychologists believe that "visceral states are known to have a [detrimental] impact on our ability to exert self-control." In psych-speak this is called "ego-depletion"—the mind struggles to restrain a bodily function, making it easier to exert self-control in other areas.

So what's going on in the case of a full bladder prompting better decisions? Tuk's hypothesis is that—because feelings of inhibition all originate from the same area of the brain—self-control in one area can affect self-control in others. "People who [are experiencing] higher levels of bladder control should be better able to control unrelated impulses," she wrote in an email to CNN.

Wondering what prompted Tuk to study the subject? Too many cups of coffee as she tried to stay awake during a long lecture.

When do you make your important decisions?

Introduction

Much of what people do is solve problems and make decisions. Often, they are "under the gun", stressed and very short for time. Consequently, when they encounter a new problem or decision they must make, they react with a decision that seemed to work before. It's easy with this approach to get stuck in a circle of solving the same problem over and over again. Therefore, it's often useful to get used to an organized approach to problem solving and decision making. Not all problems can be solved and decisions made by the following, rather rational approach. However, the following basic guidelines will get you started. Don't be intimidated by the length of the list of guidelines. After you've practiced them a few times, they'll become second nature to you -- enough that you can deepen and enrich them to suit your own needs and nature.
(Note that it might be more your nature to view a "problem" as an "opportunity". Therefore, you might substitute "problem" for "opportunity" in the following guidelines.)

Problem solving is a mental process and is part of the larger problem process that includes problem finding and problem shaping. Considered the most complex of all intellectual functions, problem solving has been defined as higher-order cognitive process that requires the modulation and control of more routine or fundamental skills. Problem solving occurs when an organism or an artificial intelligence system needs to move from a given state to a desired goal state.

Creative problem solving is the mental process of creating a solution to a problem. It is a special form of problem solving in which the solution is independently created rather than learned with assistance.

Creative problem solving always involves creativity. However, creativity often does not involve creative problem solving, especially in fields such as music, poetry, and art. Creativity requires newness or novelty as a characteristic of what is created, but creativity does not necessarily imply that what is created has value or is appreciated by other people.

To qualify as creative problem solving the solution must either have value, clearly solve the stated problem, or be appreciated by someone for whom the situation improves.

The situation prior to the solution does not need to be labeled as a problem. Alternate labels include a challenge, an opportunity, or a situation in which there is room for improvement.

Solving school-assigned homework problems does not usually involve creative problem solving because such problems typically have well-known solutions.

If a created solution becomes widely used, the solution becomes an innovation and the word innovation also refers to the process of creating that innovation. A widespread and long-lived innovation typically becomes a new tradition. "All innovations [begin] as creative solutions, but not all creative solutions become innovations." Some innovations also qualify as inventions.

Inventing is a special kind of creative problem solving in which the created solution qualifies as an invention because it is a useful new object, substance, process, software, or other kind of marketable entity.

Specific Outcome 1:
Define the problem

This is often where people struggle. They react to what they think the problem is. Instead, seek to understand more about why you think there's a problem.

Define the problem: (with input from yourself and others). Ask yourself and others, the following questions:
1. What can you see that causes you to think there's a problem?
2. Where is it happening?
3. How is it happening?
4. When is it happening?
5. With whom is it happening? (HINT: Don't jump to "Who is causing the problem?" When we're stressed, blaming is often one of our first reactions. To be an effective manager, you need to address issues more than people.)
6. Why is it happening?
7. Write down a five-sentence description of the problem in terms of "The following should be happening, but isn't ..." or "The following is happening and should be: ..." As much as possible, be specific in your description, including what is happening, where, how, with whom and why. (It may be helpful at this point to use a variety of research methods.

Defining complex problems:
If the problem still seems overwhelming, break it down by repeating the steps until you have descriptions of several related problems.

Characteristics of difficult problems
As elucidated by Dietrich Dörner and later expanded upon by Joachim Funke, difficult problems have some typical characteristics that can be summarized as follows:

- Intransparency (lack of clarity of the situation)
- Polytely (multiple goals)
- Complexity (large numbers of items, interrelations and decisions)
- Dynamics (time considerations)

Verifying your understanding of the problems:
It helps a great deal to verify your problem analysis for conferring with a peer or someone else.

Prioritize the problems:
If you discover that you are looking at several related problems, then prioritize which ones you should address first.

Note the difference between "important" and "urgent" problems. Often, what we consider to be important problems to consider are really just urgent problems. Important problems deserve more attention. For example, if you're continually answering "urgent" phone calls, then you've probably got a more "important" problem and that's to design a system that screens and prioritizes your phone calls.

Understand your role in the problem:
Your role in the problem can greatly influence how you perceive the role of others. For example, if you're very stressed out, it'll probably look like others are, too, or, you may resort too quickly to blaming and reprimanding others. Or, you are feel very guilty about your role in the problem, you may ignore the accountabilities of others.

Look at potential causes for the problem

- It's amazing how much you don't know about what you don't know. Therefore, in this phase, it's critical to get input from other people who notice the problem and who are affected by it.
- It's often useful to collect input from other individuals one at a time (at least at first). Otherwise, people tend to be inhibited about offering their impressions of the real causes of problems.
- Write down what your opinions and what you've heard from others.
- Regarding what you think might be performance problems associated with an employee, it's often useful to seek advice from a peer or your supervisor in order to verify your impression of the problem.
- Write down a description of the cause of the problem and in terms of what is happening, where, when, how, with whom and why.

Consulting Stakeholders
Advising the relevant management in your workplace is always the first step in any solution of any workplace problem. The reason for this is twofold:

- Firstly, to inform them that there is a problem and that you are dealing with it
- Secondly, so that they can contribute to the various stages of the problem solving process

Verified Information
All problems can only be defined according to the amount of information that you have regarding the problem.

The more information you have the better understanding that you will have regarding the problem at hand.

Information that has been gathered must be examined carefully in order to ascertain its accuracy and also the source of the information. All of this will impact on the problem definition and subsequent choice of a solution later.

Information must be evaluated against the following criteria:

- source – experience, reliability and bias
- accuracy
- relevance to the problem

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Specific Outcome 2:
Investigate the problem

"Understanding the problem" is often neglected as being obvious. Yet many employees and even managers are often stymied in their efforts to solve it, simply because they don't understand it fully, or even in part.

In order to remedy this oversight, you can prompt yourself by asking yourself the following questions, depending on the situation, such as:

- What are you being asked to do / find or show?
- Can you restate the problem in your own words?
- Can you think of a picture or a diagram that might help you understand the problem?
- Is there enough information to enable you to find a solution?
- Do you understand all the words (terminology) used in stating the problem?
- Do you need to ask a question to get the answer?

Each person must be able to understand at their own level of understanding so move up and down the list as appropriate until you have something constructive.

Various components of the problem
You need to understand all the components of the actual problem:
- Firstly, what is the problem?
- Who is involved?
- What resources / equipment are involved?
- What is the expected outcome?
- Am I able to solve this? Or does it need to be escalated to a higher authority?

If you are not able to answer the above questions right off you may need to source further information regarding the problem.

Sourcing information
Information gathering will depend on the problem at hand but most sources of reliable information will be from:
- Management
- Colleagues / co workers
- Subject matter experts
- Standard operating procedures / company rules and regulations
- Formal written documents / accepted practices in the workplace

- Legislation (if applicable)

Can you think of any other sources?

Specific Outcome 3:
Generate problem solutions

Identify alternatives for approaches to resolve the problem

At this point, it's useful to keep others involved (unless you're facing a personal and/or employee performance problem). Brainstorm for solutions to the problem. Very simply put, brainstorming is collecting as many ideas as possible, and then screening them to find the best idea. It's critical when collecting the ideas to not pass any judgment on the ideas -- just write them down as you hear them. (A wonderful set of skills used to identify the underlying cause of issues is Systems Thinking.)

Select an approach to resolve the problem

- When selecting the best approach, consider:
- Which approach is the most likely to solve the problem for the long term?
- Which approach is the most realistic to accomplish for now? Do you have the resources? Are they affordable? Do you have enough time to implement the approach?
- What is the extent of risk associated with each alternative?

(The nature of this step, in particular, in the problem solving process is why problem solving and decision making are highly integrated.)

Problem-solving techniques

- Abstraction: solving the problem in a model of the system before applying it to the real system
- Analogy: using a solution that solved an analogous problem
- Brainstorming: (especially among groups of people) suggesting a large number of solutions or ideas and combining and developing them until an optimum is found
- Divide and conquer: breaking down a large, complex problem into smaller, solvable problems
- Hypothesis testing: assuming a possible explanation to the problem and trying to prove (or, in some contexts, disprove) the assumption
- Lateral thinking: approaching solutions indirectly and creatively
- Means-ends analysis: choosing an action at each step to move closer to the goal
- Method of focal objects: synthesizing seemingly non-matching characteristics of different objects into something new
- Morphological analysis: assessing the output and interactions of an entire system
- Reduction: transforming the problem into another problem for which solutions exist

- Research: employing existing ideas or adapting existing solutions to similar problems
- Root cause analysis: eliminating the cause of the problem
- Trial-and-error: testing possible solutions until the right one is found

Many of the techniques and tools for creating an effective solution to a problem are described in creativity techniques and problem solving.

Creative-problem-solving techniques can be categorized as follows:

- Creativity techniques designed to shift a person's mental state into one that fosters creativity. These techniques are described in creativity techniques. One such popular technique is to take a break and relax or sleep after intensively trying to think of a solution.

- Creativity techniques designed to reframe the problem. For example, reconsidering one's goals by asking "What am I really trying to accomplish?" can lead to useful insights.

- Creativity techniques designed to increase the quantity of fresh ideas. This approach is based on the belief that a larger number of ideas increase the chances that one of them has value. Some of these techniques involve randomly selecting an idea (such as choosing a word from a list), thinking about similarities with the undesired situation, and hopefully inspiring a related idea that leads to a solution. Such techniques are described in creativity techniques.

- Creative-problem-solving techniques designed to efficiently lead to a fresh perspective that causes a solution to become obvious. This category is useful for solving especially challenging problems. Some of these techniques involve identifying independent dimensions that differentiate (or separate) closely associated concepts.[1] Such techniques can overcome the mind's instinctive tendency to use "oversimplified associative thinking" in which two related concepts are so closely associated that their differences, and independence from one another, are overlooked.

The following formalized and well-known methods and processes combine various creativity and creative-problem-solving techniques:

- TRIZ, which is also known as Theory of Inventive Problem Solving (TIPS), was developed by Genrich Altshuller and his colleagues based on examining more than 200,000 patents. This method is designed to foster the creation and development of patentable inventions, but is also useful for creating non-product solutions.

- Mind mapping is a creativity technique that both reframes the situation and fosters creativity.

- Brainstorming is a group activity designed to increase the quantity of fresh ideas. Getting other people involved can help increase knowledge and understanding of the problem and help participants reframe the problem. However, brainstorming seldom yields major innovations.

- Edward de Bono has published numerous books that promote an approach to creative problem solving and creative thinking called lateral thinking.

- The Creative Problem Solving Process (CPS) is a six-step method developed by Alex Osborn and Sid Parnes that alternates convergent and divergent thinking phases.

A frequent approach to teaching creative problem solving is to teach critical thinking in addition to creative thinking, but the effectiveness of this approach is not proven. As an alternative to separating critical and creative thinking, some creative-problem-solving techniques focus on either reducing an idea's disadvantages or extracting a flawed idea's significant advantages and incorporating those advantages into a different idea.

Creative-problem-solving tools typically consist of software or manipulatable objects (such as cards) that facilitate specific creative-problem-solving techniques. Electronic meeting systems provide a range of interactive tools for creative-problem-solving by groups over the Internet.

Pólya mentions that there are many reasonable ways to solve problems. The skill at choosing an appropriate strategy is best learned by solving many problems. You will find choosing a strategy increasingly easy. A partial list of strategies is included:

- Guess and check
- Make an orderly list
- Eliminate possibilities
- Use symmetry
- Consider special cases
- Use direct reasoning
- Solve an equation

Also suggested:

- Look for a pattern
- Draw a picture
- Solve a simpler problem
- Use a model
- Work backward
- Use a formula
- Be creative

- Use your head/noggin

Criteria for Weight and Ranking of Possible Solutions

What makes a problem a problem?

The dictionary states simply that a problem is a difficult, perplexing situation. Allen Newell and Herbert Simon (1972), two of the more notable experts in human problem solving, wrote, "A person is confronted with a *problem* when he wants something and does not know immediately what series of actions he can perform to get it." In brief, what makes a problem a problem is uncertainty regarding action; having a goal and not knowing how to achieve it.

This means that a key area of focus is the goal or solved state.

The nature of solutions and the importance of structure

A solution isn't a thing, it is a course of action that leads to a goal or solved state. An *effective* solution changes things in ways that produce the desired result. An *efficient* solution is one that produces no offsetting side effects (Barnard, 1938). Anyone wishing to understand and appreciate problem solving in an organizational and business context is advised to read Chester Barnard's classic. *The Functions of The Executive*. It was Barnard who drew the distinctions between effective and efficient solutions just cited.

When a solution is carried out, it changes things, even if only slightly. If solving a problem is a matter of changing things, then problem solving is a process of searching for those things to be changed, the ways in which they should be changed, and the means of changing them. In other words, no matter which of the three approaches is used, problem solving is a way of reducing uncertainty about action.

Action is always taken in some context (Suchman, 1987). Solutions, then, are interventions in the structure of this larger situation, and in all situations there is some underlying structure or arrangement of elements, connections, and relationships.

The search for a solution, then, is a search through the structure of a situation for those elements, connections, and relationships that, if changed in certain ways, will produce the required results

The search for a solution is enabled by knowledge of the results sought, knowledge of the structure of the situation, and knowledge of the linkages between the two. Knowing these linkages means that for a given result, one can state the actions that will lead to it and, for a given action, one can state the results it will produce. As part of any problem solving effort, it is essential to depict the structure of the situation and to tie the desired results to this structure.

Does it make a difference?
Problem-solving efforts in business organizations typically have one of three aims: to restore previous conditions, to improve upon current levels of performance (incrementally or radically), or to create conditions never before realized. Each of these aims calls for a different problem solving approach.

The Key Questions To ask Before Deciding a Solution to Implement.

- Does the solution meet **Customers' Requirements?**
- Is it aligned to the **Business Strategy** / Mission and Values /
- What Impact will this have on the business now?
- What is Potential **Impact** the solution have in the future?
- What Business **Benefit** does the solution bring? – This is one where you need to strike a balance between tangible and non-tangible ideas in order to get everybody on board. The difference between these categories is that tangible ideas will lead to a financial improvement whilst non-tangible suggestions contain a non-monetary aspect. But this doesn't mean they are not important, as often this intrinsically contributes a lot to the well-feeling and being of employees.
- Does the solution directly impact one of the **KPI's?**
- How much **Time** will it take to implement solution?
- What is the **Urgency** in implementing this solution?
- What **Investment** and resources are required? / How much will the solution **Cost?**
- What is the **Payback** (in years) for this investment?
- What is the **Value** of the solution?
- What **Authority** will be needed to approve the solution?
- How **Complex** is the solution?

It goes without saying that some of these questions may not be applicable to every type of solution you're considering and should be therefore be used as a generic guide.

It's also good practice to create a kind of scoring system for each of the answers based along the lines of

- 0 = No / None / Nil evidence
- 1 = Somewhat positive evidence
- 2 = Significant evidence
- 3 = Definite Yes.

By tallying up the individual scores for each question to a proposed solution, you start to get a feel of who's likely to top the "billboard charts".
Armed with this prioritisation matrix, select your best solution put it to test and measure, measure, measure.

Specific Outcome 4:
Implement solution(s).

The next step in the problem-solving process is to execute your solution. In some cases that requires you to only convince others that the solution you've identified is the best one. Other times, you'll also get to implement it, monitor its effectiveness, and take corrective actions as needed.

An essential part of the execution is to convince others to your way of seeing things, which will require you to communicate effectively. Make sure that you prepare your delivery and deliver your message optimally by ensuring that your ideas remain clear in your message and that your logic is sound in all of its aspects.

Consultation with Stakeholders

Collective participation in decision-making:
Give subordinates the opportunity to participate in decision-making, helping to strengthen the quality of the decision to increase its effectiveness and to achieve its purpose, as well as increase the commitment of individuals to implement all its provisions because they participated in decision-making, which helps to raise morale and increase the degree of affiliation.

Benefits of collective participation in decision-making:
1 - Verify participation to understand the subordinates of the decision and accepted it.
2 - Participation led to increased commitment by subordinates to the implementation of the resolution and their enthusiasm for this implementation.
3 - Verify participation subordinates to accommodate the objectives of resolution.

4 - Allow participation to satisfy the needs of senior personnel mines, which is in Independence and a sense of subjective and achievement.
5 - When you are participating through the method considered by members of the group Project prior to the convening of meetings to discuss and debate management style and AVI, the group was exerting pressure on their members to accept the resolution and submit to it.
6 - Enables mass participation to increase opportunities for cooperation between individuals to solve common problems.

Implementation

This step is usually easier than devising the plan. In general, all you need is care and patience, given that you have the necessary skills. Persist with the plan that you have chosen. If it continues not to work discard it and choose another.

Plan the implementation of the best alternative (this is your action plan)

1. Carefully consider "What will the situation look like when the problem is solved?"
2. What steps should be taken to implement the best alternative to solving the problem? What systems or processes should be changed in your organization, for example, a new policy or procedure? Don't resort to solutions where someone is "just going to try harder".
3. How will you know if the steps are being followed or not? (these are your indicators of the success of your plan)
4. What resources will you need in terms of people, money and facilities?
5. How much time will you need to implement the solution? Write a schedule that includes the start and stop times, and when you expect to see certain indicators of success.
6. Who will primarily be responsible for ensuring implementation of the plan?
7. Write down the answers to the above questions and consider this as your action plan.
8. Communicate the plan to those who will be involved **(Stakeholders)** in implementing it and, at least, to your immediate supervisor.

(An important aspect of this step in the problem-solving process is continually observation and feedback.)

Specific Outcome 5:
Evaluate the effectiveness of the solution

Pólya mentions that much can be gained by taking the time to reflect and look back at what you have done, what worked and what didn't.

Doing this will enable you to predict what strategy to use to solve future problems, if these relate to the original problem.

Monitor implementation of the plan
Monitor the indicators of success:

1. Are you seeing what you would expect from the indicators?
2. Will the plan be done according to schedule?
3. If the plan is not being followed as expected, then consider: Was the plan realistic? Are there sufficient resources to accomplish the plan on schedule? Should more priority be placed on various aspects of the plan? Should the plan be changed?

Verify if the problem has been resolved or not
One of the best ways to verify if a problem has been solved or not is to resume normal operations in the organization. Still, you should consider:

1. What changes should be made to avoid this type of problem in the future? Consider changes to policies and procedures, training, etc.
2. Lastly, consider "What did you learn from this problem solving?" Consider new knowledge, understanding and/or skills.
3. Consider writing a brief memo that highlights the success of the problem solving effort, and what you learned as a result. Share it with your supervisor, peers and subordinates.

Evaluation Criteria
Your evaluation could be as simple as asking yourself: “Did it work?”

Some other criteria can include:

- Have all parties involved happy with the solution outcome?
- Was the outcome cost effective?
- Will we be able to use this solution technique again if the same problem arises?

Corrective Action

If you are still having problems, or your expectations have not been met, call in your key players again. Look at whether the plan was unrealistic, if you had the right resources, was it communicated enough, and did you prioritized correctly. If needed, the plan should be changed. Go through the steps again until you fully resolve the issue and find the exact solution.

Have you made decisions that seemed right at the time, but did not turn out the way you expected?

In a coaching session with a manager, who was dealing with a setback, I asked what did she learn? She answered honestly and with some regret:
"I wanted it to happen so badly that I didn't pay attention to the red flags that were right in front of me."

How to Avoid Bad Consequences

Most of our setbacks are not due to bad circumstances but to bad decisions. We forget that a decision is an action that has consequences. It is a commitment of limited resources (time, money, reputation, manpower) that we can never get back. Here are three suggestions to help managers pause the action button, see the red flags and evaluate the potential problems.

1. Slow it down.

A quick decision isn't always the best decision. Get in the habit of asking: Why do I (or we) have to make this decision right now? Who or what is pressuring us to take action and why? What would happen if we waited?

2. Let go.

This may be extremely difficult because many leaders want to be "in control". Yet, your staff may be in a better position than you in understanding the facts and circumstances.

3. Get support.

Find a coach or colleague who can relate to your world. Ask yourself, "Who is able to fully comprehend the issues and stress I'm facing? Who can help me see this problem, the crisis, or the opportunity more clearly?"

Management Success Tip:

If you're sitting on the fence about a major decision, take time to reflect and gain greater clarity. What kind of challenge or problem is it? How big is it? Is it worth my time and energy? What path seems right? What the worst, and the best possible, thing that could happen? Am I paying attention to the red flags that are waving at me? Am I ready to get off the fence? If yes, what's next? If no, what do I need to get moving?

Formative Assessment Activity 1
Please open your Portfolio of evidence (Logbook) and complete the activities for this specific outcome, following the instructions found in your logbook.

Your facilitator will advise you as to the requirements and deadlines for completing and handing in these formative assessments. Write these instructions here:

NOTES

Unit Standard 242822
Employ a systematic approach to achieving objectives

When you have completed this section, you will be able to understand and explain the following:
- ✡ Identify and develop objectives
- ✡ Formulate a plan to meet the objective
- ✡ Implement the plan
- ✡ Monitor activities

Most of this unit standard has already been covered in the previous learning topic, so we will only look at those areas here that was not covered already.

Identify and Develop Objectives
A **goal** or **objective** is a projected state of affairs that a person or a system plans or intends to achieve—a personal or organizational desired end-point in some sort of assumed development. Many people endeavor to reach goals within a finite time by setting deadlines.

It is roughly similar to purpose or aim, the anticipated result which guides action, or an **end**, which is an object, either a physical object or an abstract object, that has intrinsic value.

Goal-setting ideally involves establishing specific, measurable, attainable, realistic and time-targeted objectives. Work on the goal-setting theory suggests that it can serve as an effective tool for making progress by ensuring that participants have a clear awareness of what they must do to achieve or help achieve an objective. On a personal level, the process of setting goals allows people to specify and then work towards their own objectives — most commonly financial or career-based goals. Goal-setting comprises a major component of Personal development.

Short-term goals
Short-term goals expect accomplishment in a short period of time, such as trying to get a bill paid in the next few days. The definition of a short-term goal need not relate to any specific length of time. In other words, one may achieve (or fail to achieve) a short-term goal in a day, week, month, year, etc. The time-frame for a short-term goal relates to its context in the overall time line that it is being applied to. For instance, one could measure a short-term goal for a month-long project in days; whereas one might measure a short-term goal for someone's lifetime in months or in years. Planners usually define short-term goals in relation to a long-term goal or goals.

Personal goals
Individuals can set personal goals. A student may set a goal of a high mark in an exam. An athlete might walk five miles a day. A traveler might try to reach a destination-city within three hours. Financial goals are a common example, to save for retirement or to save for a purchase.

Managing goals can give returns in all areas of personal life. Knowing precisely what one wants to achieve makes clear what to concentrate and improve on, and often subconsciously prioritizes that goal.

Goal setting and planning ("goal work") promotes long-term vision and short-term motivation. It focuses intention, desire, acquisition of knowledge, and helps to organize resources.

Efficient goal work includes recognizing and resolving all guilt, inner conflict or limiting belief that might cause one to sabotage one's efforts. By setting clearly-defined goals, one can subsequently measure and take pride in the achievement of those goals. One can see progress in what might have seemed a long, perhaps impossible, grind.

Achieving personal goals

Achieving complex and difficult goals requires: focus, long-term diligence and effort. Success in any field requires forgoing excuses and justifications for poor performance or lack of adequate planning; in short, success requires emotional maturity. The measure of belief that people have in their ability to achieve a personal goal also affects that achievement.

Long term achievements rely on short-term achievements. Emotional control over the small moments of the single day makes a big difference in the long term.

One formula for achievement reads A=I M where A = achievement, I = intelligence, and M = motivation. When motivation equals zero, achievement always equals zero, no matter the degree of intelligence. Similarly for intelligence: if intelligence equals zero, achievement always equals zero. The higher the combination of both intelligence and the motivation, the higher the achievement.

Goals, objectives and targets
Strategic planning is a very important business activity. It is also important in the public sector areas such as education. It is practiced widely informally and formally. Strategic planning and decision processes should end with objectives and a roadmap of ways to achieve them.

One of the core goals when drafting a strategic plan is to develop it in a way that is easily translatable into action plans. Most strategic plans address high level initiatives and over-arching goals, but don't get articulated (translated) into day-to-day projects and tasks that will be required to achieve the plan. Terminology or word choice, as well as the level a plan is written, are both examples of easy ways to fail at translating your strategic plan in a way that makes sense and is executable to others. Often, plans are filled with conceptual terms which don't tie into day-to-day realities for the staff expected to carry out the plan.

The following terms have been used in strategic planning: desired end states, plans, policies, goals, objectives, strategies, tactics and actions. Definitions vary, overlap and fail to achieve clarity. The most common of these concepts are specific, time bound statements of intended future results and general and continuing statements of intended future results, which most models refer to as either goals or objectives (sometimes interchangeably).

One model of organizing objectives uses hierarchies. The items listed above may be organized in a hierarchy of means and ends and **numbered** as follows: Top Rank Objective (TRO), Second Rank Objective, Third Rank Objective, etc. From any rank, the objective in a lower rank answers to the question "How?" and the objective in a higher rank answers to the question "Why?" The exception is the Top Rank Objective (TRO): there is no answer to the "Why?" question. That is how the TRO is defined.

People typically have several goals at the same time. "Goal congruency" refers to how well the goals combine with each other. Does goal A appear compatible with goal B? Do they fit together to form a unified strategy? "Goal hierarchy" consists of the nesting of one or more goals within other goal(s).

One approach recommends having short-term goals, medium-term goals, and long-term goals. In this model, one can expect to attain short-term goals fairly easily: they stand just slightly above one's reach. At the other extreme, long-term goals appear very difficult, almost impossible to attain. Strategic management jargon sometimes refers to "Big Hairy Audacious Goals" (BHAGs) in this context.

Using one goal as a stepping-stone to the next involves **goal sequencing**. A person or group starts by attaining the easy short-term goals, then steps up to the medium-term, then to the long-term goals. Goal sequencing can create a "goal stairway". In an organizational setting, the organization may co-ordinate goals so that they do not conflict with each other. The goals of one part of the organization should mesh compatibly with those of other parts of the organization.

Goal management in organizations

Organizationally, goal management consists of the process of recognizing or inferring goals of individual team-members, abandoning no longer relevant goals, identifying and resolving conflicts among goals, and prioritizing goals consistently for optimal team-collaboration and effective operations.
For any successful commercial system, it means deriving profits by making the best quality of goods or the best quality of services available to the end-user (customer) at the best possible cost. Goal management includes:

- Assessment and dissolution of non-rational blocks to success
- Time management
- Frequent reconsideration (consistency checks)
- Feasibility checks
- Adjusting milestones and main-goal targets

Morten Lind and J.Rasmussen distinguish three fundamental categories of goals related to technological system management:

1. Production goal
2. Safety goal
3. Economy goal

An organizational goal-management solution ensures that individual employee goals and objectives align with the vision and strategic goals of the entire organization. Goal-management provides organizations with a mechanism to effectively communicate corporate goals and strategic objectives to each person across the entire organization. The key consists of having it all emanate from a pivotal source and providing each person with a clear, consistent organizational-goal message. With goal-management, every employee understands how their efforts contribute to an enterprise's success.

An example of goal types in business management:

- Consumer goals: this refers to supplying a product or service that the market/consumer wants
- Product goals: this refers to supplying a product outstanding compared to other products—perhaps due to the likes of quality, design, reliability and novelty
- Operational goals: this refers to running the organization in such a way as to make the best use of management skills, technology and resources
- Secondary goals: this refers to goals which an organization does not regard as priorities

NOTES

Planning of Objectives - Methodologies
There are many approaches to strategic planning but typically a three-step process may be used:

- **Situation** - evaluate the current situation and how it came about.
- **Target** - define goals and/or objectives (sometimes called ideal state)
- **Path** - map a possible route to the goals/objectives

One alternative approach is called *Draw-See-Think*

- **Draw** - what is the ideal image or the desired end state?
- **See** - what is today's situation? What is the gap from ideal and why?
- **Think** - what specific actions must be taken to close the gap between today's situation and the ideal state?
- **Plan** - what resources are required to execute the activities?

An alternative to the *Draw-See-Think* approach is called *See-Think-Draw*

- **See** - what is today's situation?
- **Think** - define goals/objectives
- **Draw** - map a route to achieving the goals/objectives

In other terms strategic planning can be as follows:

- **Vision** - Define the vision and set a mission statement with hierarchy of goals and objectives
- **SWOT** - Analysis conducted according to the desired goals
- **Formulate** - Formulate actions and processes to be taken to attain these goals
- **Implement** - Implementation of the agreed upon processes
- **Control** - Monitor and get feedback from implemented processes to fully control the operation

Evaluating Goal / Objectives

Managers cannot be constantly able to drive motivation and keep track of an employee's work on a continuous basis. Goals are therefore an important tool for managers since goals have the ability to function as a self-regulatory mechanism that acquires an employee a certain amount of guidance Shalley, 1995 and Locke and Latham (2002) have distilled four mechanisms through which goal setting is able to affect individual performance:

1. Goals focus attention towards goal-relevant activities and away from goal-irrelevant activities.
2. Goals serve as an energizer; higher goals will induce greater effort while low goals induce lesser effort.
3. Goals affect persistence; constraints with regard to resources will affect work pace.
4. Goals activate cognitive knowledge and strategies which allows employees to cope with the situation at hand.

Through an understanding of the effect of goal setting on individual performance organizations are able to use goal setting to benefit organizational performance. Locke and Latham have therefore indicated three moderators which indicate the success of goal setting:[

Goal commitment
People will perform better when they are committed to achieve certain goals. Goal commitment is dependent of:

1. The importance of the expected outcomes of goal attainment and;
2. Self-efficacy – one's belief that they are able to achieve the goals;
3. Commitment to others – promises or engagements to others can strongly improve commitment

Feedback
Keep track of performance to allow employees to see how effective they have been in attaining the goals. Without proper feedback channels it is impossible to adapt or adjust to the required behavior.

Task complexity
More difficult goals require more cognitive strategies and well developed skills. The more difficult the tasks ahead, a smaller group of people will possess the necessary skills and strategies. From an organizational perspective it is thereby more difficult to successfully attain more difficult goals since resources become more scarce.

Employee motivation
The more employees are motivated, the more they are stimulated and interested in accepting goals.

These success factors are not to be seen independently. For example the expected outcomes of goals are positively influenced when employees are involved in the goal setting process. Not only does participation increase commitment in attaining the goals that are set, participation influences self-efficacy as well. In addition to this feedback is necessary to monitor one's progress. When this is left aside, an employee might think (s)he is not making enough progress. This can reduce self-efficacy and thereby harm the performance outcomes in the long run.

Summary of approaches for conducting evaluations				
Approach	Attribute			
	Organizer	Purpose	Key strengths	Key weaknesses
Politically controlled	Threats	Get, keep or increase influence, power or money.	Secure evidence advantageous to the client in a conflict.	Violates the principle of full & frank disclosure.
Public relations	Propaganda needs	Create positive public image.	Secure evidence most likely to bolster public support.	Violates the principles of balanced reporting, justified conclusions, & objectivity.
Experimental research	Causal relationships	Determine causal relationships between variables.	Strongest paradigm for determining causal relationships.	Requires controlled setting, limits range of evidence, focuses primarily on results.
Management information systems	Scientific efficiency	Continuously supply evidence needed to fund, direct, & control programs.	Gives managers detailed evidence about complex programs.	Human service variables are rarely amenable to the narrow, quantitative definitions needed.
Testing programs	Individual differences	Compare test scores of individuals & groups to selected norms.	Produces valid & reliable evidence in many performance areas. Very familiar to public.	Data usually only on tested performance, overemphasizes test-taking skills, can be poor sample of what is taught or expected.
Objectives-based	Objectives	Relates outcomes to objectives.	Common sense appeal, widely used, uses behavioral objectives & testing technologies.	Leads to terminal evidence often too narrow to provide basis for judging the value of a program.
Content analysis	Content of a communication	Describe & draw conclusion about a communication.	Allows for unobtrusive analysis of large volumes of unstructured,	Sample may be unrepresentative yet overwhelming in volume. Analysis

			symbolic materials.	design often overly simplistic for question.
Accountability	Performance expectations	Provide constituents with an accurate accounting of results.	Popular with constituents. Aimed at improving quality of products and services.	Creates unrest between practitioners & consumers. Politics often forces premature studies.
Decision-oriented	Decisions	Provide a knowledge & value base for making & defending decisions.	Encourages use of evaluation to plan & implement needed programs. Helps justify decisions about plans & actions.	Necessary collaboration between evaluator & decision-maker provides opportunity to bias results.
Policy studies	Broad issues	Identify and assess potential costs & benefits of competing policies.	Provide general direction for broadly focused actions.	Often corrupted or subverted by politically motivated actions of participants.
Consumer-oriented	Generalized needs & values, effects	Judge the relative merits of alternative goods & services.	Independent appraisal to protect practitioners & consumers from shoddy products & services. High public credibility.	Might not help practitioners do a better job. Requires credible & competent evaluators.
Accreditation / certification	Standards & guidelines	Determine if institutions, programs, & personnel should be approved to perform specified functions.	Helps public make informed decisions about quality of organizations & qualifications of personnel.	Standards & guidelines typically emphasize intrinsic criteria to the exclusion of outcome measures.
Connoisseur	Critical guideposts	Critically describe, appraise, & illuminate an object.	Exploits highly developed expertise on subject of interest. Can inspire others to more insightful efforts.	Dependent on small number of experts, making evaluation susceptible to subjectivity, bias, and corruption.
Adversary	“Hot” issues	Present the pro & cons of an issue.	Ensures balances presentations of represented perspectives.	Can discourage cooperation, heighten animosities.
Client-centered	Specific concerns & issues	Foster understanding of activities & how they are valued in a given setting & from	Practitioners are helped to conduct their own evaluation.	Low external credibility, susceptible to bias in favor of participants.

		a variety of perspectives.		
Note. Adapted and condensed primarily from House (1978) and Stufflebeam & Webster (1980).				

Formative Assessment Activity 2
Please open your Portfolio of evidence (Logbook) and complete the activities for this specific outcome, following the instructions found in your logbook.

Your facilitator will advise you as to the requirements and deadlines for completing and handing in these formative assessments. Write these instructions here:

Unit Standard: 242814
Identify and explain the core and support functions of an organization

When you have completed this section, you will be able to understand and explain the following:

- Identify and explain the core business of an organization
- Explain the types of work done within the various core activities of an organization
- Explain the role of a selected work unit in an organization
- Identify and explain the difference between the line and support functions

Specific Outcome 1
Identify and explain the core business of an organization.

1.1 What is a business?

Our purpose in business is to create wealth, to make money. For this to be possible, we must please our customers and enjoy the confidence of our shareholders and employees. We must make good profits, so that, after providing for taxes and dividend (and in present circumstances, financing inflation), there is enough money available to keep our factories and equipment modern and enable us to grow in strength and maintain or improve our market position. We endeavor to provide good, satisfying employment for our people. Creating wealth and building a better company is our contribution to a better standard of living

The Corporate Report A business is an organization/undertaking in which the owner/partners sell goods or render services to customers in order to gain a profit.
Businesses exist:

- because a gap in the market is identified
- to meet needs and wants of potential customers
- to make a profit and create wealth

Businesses contributes tremendously to the wealth creation process in our land. Wealth is created through the processing of resources into products and services, which are sold to customers who have a need for the product or service.

For example, a contractor builds houses (a process) using bricks, sand and cement (resources), and these houses are sold to people who have a need for houses (market).

Businesses also create job opportunities, which is very important for the economic state of any country.

1.2 Core business

This is a function that is crucial to the successful operation of the business, the main" or "essential" activity of the business – the reason the business exists.

For example, KFC's core business is take-away food in the form of chicken meals. Spur, on the other hand, prepares meals where families can sit down and enjoy an evening out. Although both these companies are in the food business, their core business differs.

Big commercial banks' core business is providing the service of taking care of other people's money:

- Banks give us a safe and easy way to store money: through various types of banking accounts
- We can easily withdraw the money through debit cards, cheques, debit orders, etc.
- We can make payments from our bank account
- We can invest money through term deposits

As a secondary service, banks will also lend money, but their primary focus is on large loans, as there is a minimum fee involve.

Micro lenders, on the other hand, specialize in lending out small amounts of money – that is their core business.

Edgars and other clothing stores give us the opportunity to buy clothes on credit – this is their core business. They also supply household goods, cosmetics and even toys, but these are supplementary to the core business.

A petrol station's core activity is to provide petrol, e.g. BP and Sasol petrol stations. They also have convenience stores, but the core business is to provide petrol and diesel to motorists.

NuMetro and Ster Kinekor's core business is to show films. We can also buy popcorn, cold drinks and so on, but their core business is to charge us for watching films

Core activities Core activities are directly related to the income generated by an organization. In other words, production of goods, purchasing and sales of goods or services

In order to explain core activities, we will discuss a value chain.

The value chain was created by ME.E Porter in his book, Competitive Advantage (1980).

The chain consists of a series of activities that create and build value. They culminate in the total value delivered by an organization. Products pass through all activities of the chain in order, and at each activity the product gains some value. The core activities include:

- Inbound logistics
- operations (production)
- outbound logistics
- marketing and sales (demand)
- and services (maintenance)

In the context of the value chain, logistics is the management of the flow of goods, information and other resources through the organization in order to produce goods or services.

If we look at a manufacturing plant:

- inbound logistics would include obtaining the raw material for manufacturing the goods
- operations would be the actual manufacture of the goods
- outbound logistics would include storing the manufactured goods until it is sold marketing and selling would be the actual sales of the goods
- maintenance would include repairing damaged goods

As you can see, value is added to the product at every step of the way. Therefore, it is called the value chain and it has to do with the core activities of the organization.

The support activities include:

- administrative infrastructure management so that invoices can be issued, and payment collected
- human resource management to train employees, negotiate salaries, etc
- technology
- procurement – to ensure sufficient employees to do the work

Support functions Support functions are functions which support and indirectly contribute to the main purpose of the organization and include:

Human resources The HR department is responsible for ensuring that the organization has sufficient employees with the required knowledge and skills to do the work. Human resources is also responsible for the training and development of staff as well as negotiating of salaries.

The **IT department** is responsible for the efficient running of the IT system in the organization.

The **Finance Departmen**t is responsible for credit control, accounting and ensuring that the financial statements of the organization are audited. The finance department also has to make sure that there is money available to purchase raw materials and equipment as and when necessary

Seeking **Lega**l advice and taking legal action when necessary is a supportive function as it only supports the core activities of the organization.

Communication is the responsibility of everyone in the organization and is a supportive activity.

1.3 Relationships between core activities

The easiest way to understand the relationship between the different activities in an organization is to look at the system theory. In the business world, a system consists of several interdependent parts that function as a whole and have a common purpose.

- A business or organization is seen as a united, purposeful system with interdependent parts, functions and departments.
- The different parts, functions and departments of the business system are dependent on each other and are therefore mutually bound to each other.
- The different parts of the business system are orderly arranged according to a plan.

The different parts of a system are called subsystems. It is very important to note that subsystems are dependent on each other and that all the subsystems make up the whole business system.

The systems theory was formulated in order to make it possible to understand the working of an entity, such as a business. Of course, the business is a whole system. When you look at a business and its place in the environment, the business becomes a subsystem.

Terminology

Open and closed systems

Open systems interact with their environment all the time and they also depend on the environment for their success and existence. A business is an example of an open system.
The business interacts with the outside environment daily –

- This is where their raw products and goods come from,
- Where finished products and services go,
- Where their employees come from,
- Where the business gets resources such as water and lights from

A closed system does not interact with the environment and the environment has no influence on the system. Closed systems are usually mechanical, and they have predetermined activities that will be performed, irrespective of the environment. A watch is an example of a closed system.

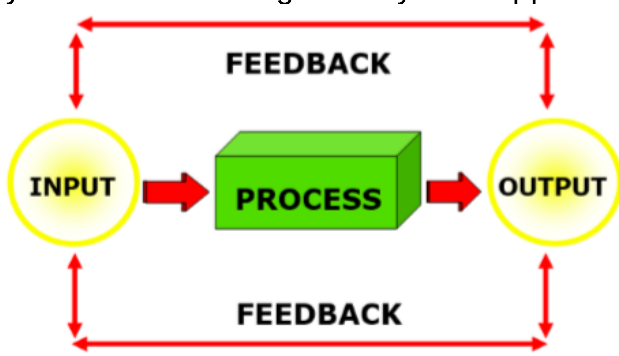
Flow through a system

Information, material and energy flow into the system, through the system and out of the system. This is true of all the subsystems in the business, the business system as a whole and the interaction between the business and the environment. The basic elements of a system are called the inputs, processing and outputs of the system.

The outputs of one system become the inputs of another system. In that system, the inputs are processed and become outputs, which then become inputs of another system.

Feedback

This is the key to controlling the system and subsystems. Feedback is used during the input, processing and output of each subsystem to evaluate the functioning of the system – is it working the way it is supposed to?



The business processes

Inputs

Inputs are what is needed to do the work. In manufacturing, inputs are raw materials that you start with to make something else. For example, if you want to bake a cake you need flour, eggs, milk, effort and skill of a person baking the cake, and so on. If you want to build a house you need sand, cement, bricks, and so on.

When you are processing information, the gathering and capturing of raw data would be inputs. If you are working on the payroll, inputs would be salary and wage levels, employee details, overtime hours worked, bonuses that have to be paid, etc.

Processes

Processes bring together all the inputs in such a way that it produces the desired product. All the steps, processes, procedures and modifications to the raw materials to produce the products and services of the business come into play here. Often businesses have unique processes that make their products special. In manufacturing, for example, all the inputs are brought together to make the parts. In our examples above, the inputs are used in the process of building a house or baking a cake.

Outputs

The result of what is done in the process/production phase is called an output. The finished product, the finished house and the finished cake are all outputs.

Outputs can be divided into tangible and intangible outputs:

- Tangible outputs are things that you can see and touch, like a box of matches
- Intangible outputs are services such as in hospitals, training, telecommunications

Feedback

No process is complete without feedback. After a business has sold a product or provided a service, it must get feedback. Examples of feedback include whether the customers buy or do not buy the product/service, financial figures, staff turnover, sales, and so on.

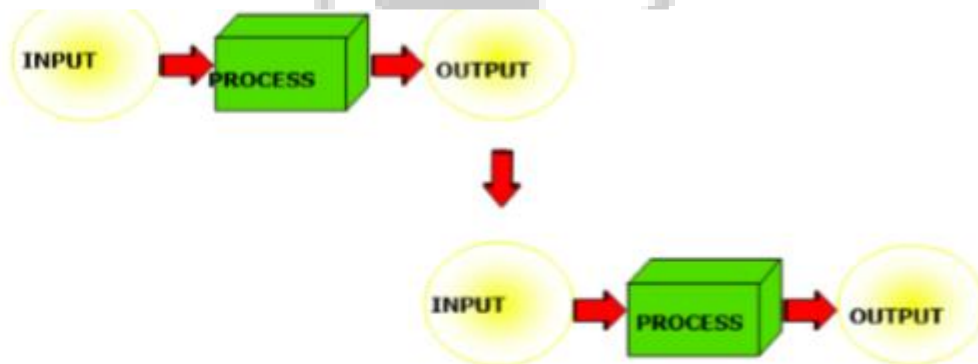
In our examples, the comments about the house – does it look nice, are people eager to stay in the house, etc., in the case of the cake – do people eat it and tell you how good it tastes, how nice it looks, etc.

Business systems and the business process

As mentioned, any business or organization is made up of subsystems. All these subsystems have inputs, processes, outputs and feedback. The output of one system becomes the input of another system. The purchasing department must ensure that they purchase the correct raw materials for production department. Their output is the raw material used by production. The raw material becomes the input for production department, the process is manufacturing the product, their output is the finished product.

The finished product becomes the input for sales department who have to sell the product. The process is the actual selling of the product to customers and the output is the sold product.

In this way, all the subsystems of the business is linked to each other.



NOTES:

Specific Outcome 2
Explain the types of work done within the various core activities of an organization

2.1 Roles in a Department

Everybody who works in an organization has an important role to play. These roles are determined by the hierarchy of the organization and the level at which the person is employed:

2.2 Organization Hierarchy

An organization is structured to show the various relationships between individuals and the different departments.

The structure of the organization also shows the channels of reporting and communication as well as the channels of command in the organization: who makes the decisions and who reports to who.

Everyone needs to know what they must do and who they must report to. Each person is responsible for a function or job. Each individual is given a position with responsibilities, so that everyone knows who is doing what.

This structure is sometimes called an organizational chart or organogram. The reason for having structure in a business is to ensure that there is a framework within which the various functions or departments can work effectively.

The hierarchy of the organization is also known as the chain of command: instructions are passed from top management to middle management to junior management to workers by following the hierarchy (chain of command) of the organization. We will explain the roles of each by looking at the broad functions of each role.

Top Management

This management level is responsible for the organization as a whole.

Top management consists of the board of directors, the managing director, and the chief executives. They will determine the organization's mission, goals and strategies.

They will be responsible for:

- the long-term planning of the organization,

- designing the broad structure of the organization and
- leading and controlling the organization in the sometimes-difficult business environment.

Top management will look at trends in the business world and adjust the organization's goals and objectives accordingly. Top management will not usually become involved in the day-to-day activities of production and sales, etc.

For example, if the organization is a bus transport company and commuters are starting to make more use of bus services than travelling by train, it is top management's job to see this trend and to make arrangements for the organization to be able to transport more passengers. They could introduce additional routes, more buses, and so on.

Top management therefore spends:

- Most of their time on strategic planning,
- A reasonable amount of time on management planning and
- Little of their time on operations planning.

Middle Management

Is responsible for specific departments in the organization.

Refer to section, where different departments were discussed. Each such a department will be headed by a manager. These managers must implement the policies, plans and procedures that are formulated by top management.

Managers at middle management level are responsible for short to medium term planning. They must organize their functional areas (departments), they usually lead through department heads and they control the activities of their own departments.

Middle managers also monitor the business environment to see how it will affect their department. If we use the same example as above, middle management will get the new plans for more routes and buses from top management. Middle management then has to implement these plans by ensuring that the routes will be cost-effective. Middle management also has to plan and organize the resources: drivers, buses, ticket offices, people to service the buses, etc. These plans are then handed to the first line managers.

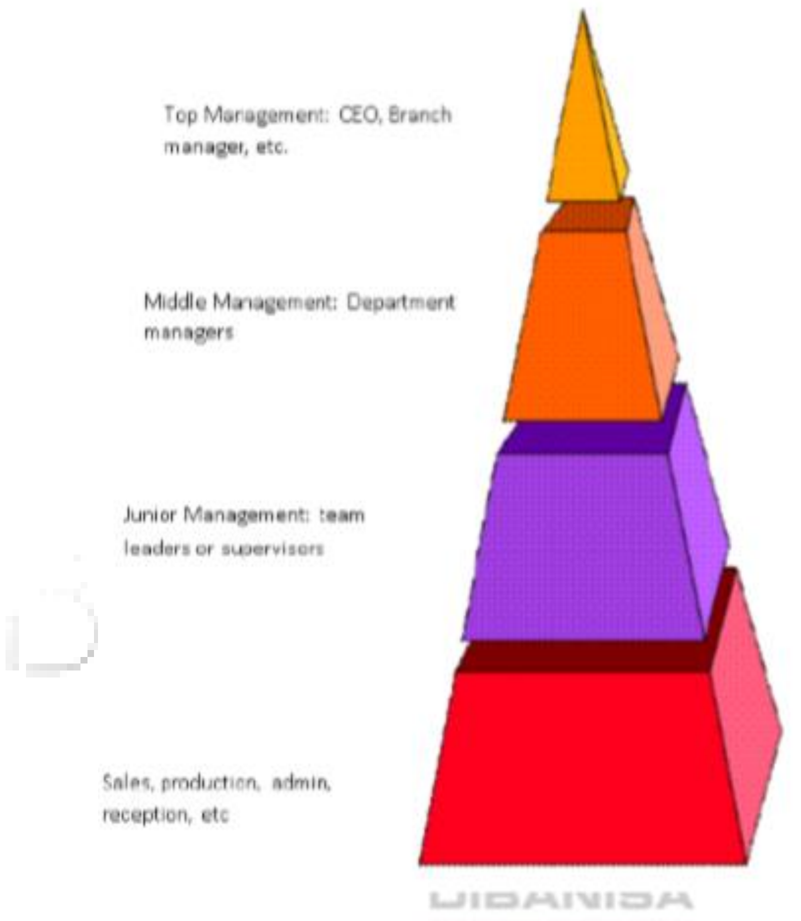
Middle management is mainly concerned with:

- medium- and short-term planning: three months to a year, sometimes longer. This planning is called tactical planning.

- organizing, activating and controlling so that the work in their department gets done the way it should
- and makes less important decisions following the guidelines set by top management.

Middle management therefore spends:

- Most of their time on management planning
- A reasonable amount of time on operations planning
- Some time on strategic planning



First Line Management

Are also called supervisors, foremen or team leaders.
They will be responsible for sub-sections within departments.

In the marketing department, for example, you could find product managers, promotions managers and sales managers. In the operations department you would find foremen.

The managerial functions of first line managers revolve around the daily activities of the various departments. They are responsible for short-term planning and for implementing the plans of middle management.

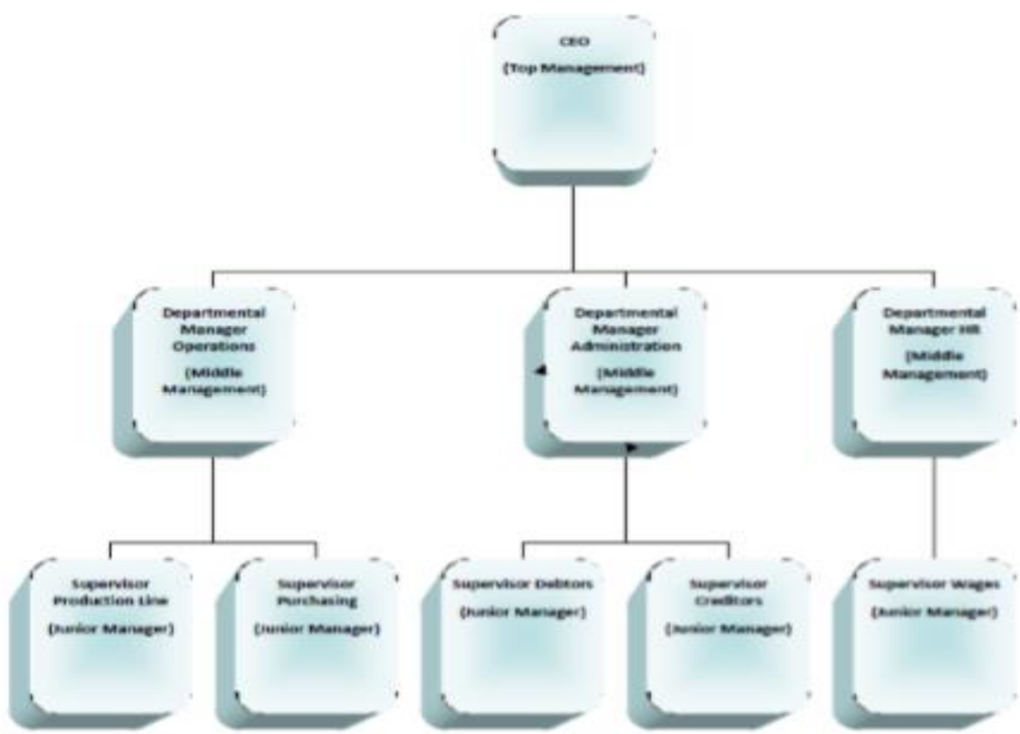
Their main concern is to apply rules and procedures so that maximum productivity takes place. They will provide technical assistance to employees, motivate subordinates and ensure that daily tasks are completed.

First line managers are directly in control of productivity and play a vital role in the relationship between management and employees.

A first line manager must implement the objectives of middle management and see to it that workers who are responsible to them perform satisfactorily. First line management is also a link between workers and higher levels of management. A first line manager focuses on short term goals: the day-to-day operation of his/her section, weekly and monthly planning so that the job gets done the way it should. This is called operational planning.

Supervisors therefore spend:

- Most of their time on operations planning
- Some time on management planning
- Normally no time on strategic planning, except to pass strategic information on to higher levels of management



Practical Application of The Four Management Functions So, first line managers get their medium- and short-term plans from middle management. This would include production targets for the day, the week, the month and so on. The first line manager then must plan the activities of his/her section for the day, week and month in such a way that the targets are met. Once the manager has worked out a short term plan, he has to allocate resources so that the target is met: people to do the work, machinery, equipment and raw materials must be at the right place at the right time so that the job can be done. This is his organizing function.
Soon as the work is in progress, due to the planning and organizing of the first line manager, he must control that the work is being done on time.
If there are problems, he has to adjust his plan and reorganize the resources so that the work can continue with minimum disruption. While the work is being done, he must also lead the employees: motivate them to work smoothly together as a team, as this is the only way the work will be done on time.

If we look at the bus transport company:

- One supervisor will oversee the drivers on a specific route, so if there are ten routes, there might be ten supervisors reporting to one middle manager. Each supervisor must ensure that he has enough drivers for the routes allocated to him, he must ensure that he has buses, he must ensure that the buses are in good working order, and so on. If there are problems, he has to sort them out with the minimum delay so that the passengers are not inconvenienced. His planning will be short term: daily, weekly, monthly.
- Another supervisor will oversee ticket sales and he also has to plan, organize, control and lead.
- There will be a supervisor in charge of the mechanics, and so on.

Summary

- Top management will focus on the strategic matters, such as the equity partners, which tenders to tender for and what strategy to be followed in the tender process.
- Middle management will focus on the planning of the service, vehicles required, service specifications, budgets, and so on.
- Junior management (supervisors) will focus on the detailed operational planning
- □ the day-to-day operation of the bus or transport service in terms of the parameters provided by middle and top management.

2.3 Work Categories

The work in any business and other organization is divided into work categories, depending on the hierarchy and structure of the organization.

Administration

Administration covers a wide field, depending on the core business of the organization, but some of the work categories include:

- Filing clerk
- Invoicing clerk
- Customer service
- Reception, etc.

"Invoice-control clerk"
Job Description and Jobs

- Compiles data from vendor invoices and supporting documents to verify accuracy of billing data and to ensure receipt of items ordered, using calculator and computer
- Compares invoices against purchase orders and shipping and receiving documents to verify receipt of items ordered.
- Reads computer files or computes figures to determine prices and discounts, following invoices and credit memorandums, and using calculator.
- Records data in control records.
- Contacts vendors or buyers regarding errors in partial or duplicate shipments, prices, and substitutions.
- Maintains file of returnable items received from or returned to vendors.
- Writes cheque or prepares electronic transfers of payment to vendors.

Sales

In the sales department, you could find the following categories of work:

- Inbound sales
- Outbound sales
- Mail order sales
- Corporate sales
- Telephonic sales

Here are examples of job descriptions of inbound and outbound sales consultants:

Inbound Call Center

General Purpose: Answer incoming calls from customers to take orders, answer inquiries and questions, handle complaints, troubleshoot problems and provide information. Main Job Tasks and Responsibilities

- answer calls professionally
- respond to customer inquiries
- research required information using available resources
- handle and resolve customer complaints
- provide customers with product and service information
- enter customer information
- process orders, forms and applications
- identify and escalate priority issues
- route calls to appropriate resource
- follow up customer calls where necessary
- complete call logs
- produce call reports

Motor vehicle workshop

Some work categories you could find in a workshop
- Foreman
- Mechanic
- Auto electrician
- Air conditioning technician

Mechanics (Automotive service technicians Automotive service technicians inspect, maintain, and repair automobiles and light trucks that run on gasoline, electricity, or alternative fuels, such as ethanol. They perform basic care maintenance, such as oil changes and tire rotations, diagnose more complex problems, and plan and execute vehicle repairs. During routine service inspections, technicians test and lubricate engines and other major components. Sometimes, technicians repair or replace worn parts before they cause breakdowns or damage the vehicle. Technicians usually follow a checklist to ensure that they examine every critical part. Belts, hoses, plugs, brakes, fuel systems, and other potentially troublesome items are watched closely.

Security guard

Even a security guards' job has changed to include more responsibilities. These days' security guards are expected to:

- control who comes in and out of the building
- goods that are taken in and out, e.g. laptops and cell phones

- escort customers to employees for appointments
- escort vehicles to delivery bays
- assist customers with enquiries

Bringing it together

We will now look at examples of how the different functions work together to form a complete whole: an effectively run business.

Salaries and wages

- The HR function will determine the salaries for employees,
- while the administration function will ensure that the salaries and wages are paid on time
- and the financial department must make sure that there is enough money to pay the salaries and wages.

Purchasing

- Stores or finance will advise purchasing that certain products and/or goods must be purchased
- The purchasing department will find out where to buy to goods and services needed, they will place the order,
- finance will make sure that there is money to pay for the goods and
- administration will make the payment.

Sales

- receiving will receive the goods, check to make sure all the goods have been received and that the price is correct and send the goods to stores
- stores will keep the goods safe until sales take place
- sales will sell the goods to generate a profit
- stores will send goods to dispatch for delivering to the clients
- dispatch will check that the goods match invoices and send drivers with vehicles to deliver the goods to the clients

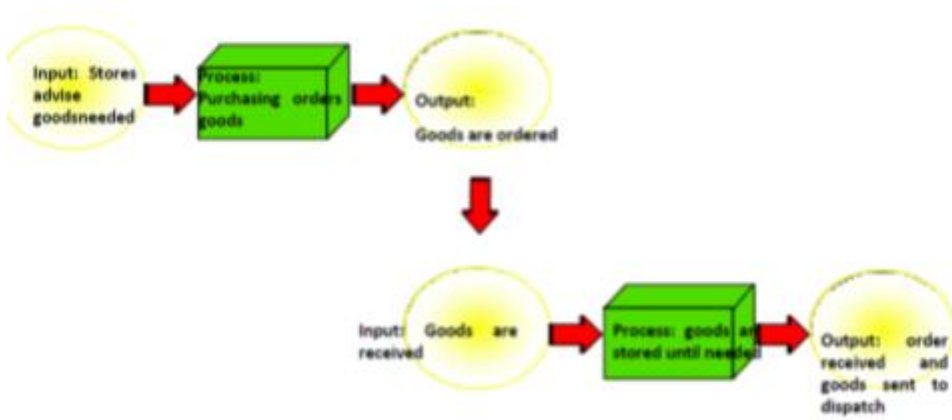
Finance

Finance and/or administration will make sure that the money for the goods is paid to the business and deposit this into the bank, thereby providing more money for wages and purchase of goods

Workshop

Will service the vehicles so that goods can be delivered on time and so the cycle starts again with purchases ordering goods.

A diagram of how purchasing and Stores interrelate



Notes:

Specific Outcome 3
Explain the role of a selected work unit in an organization in relation to the core business

3.1 Introduction

Core business processes means that a firm's success depends not only on how well each department performs its work, but also on how well the company manages to coordinate departmental activities to conduct the core business process, which are:

1. The market-sensing process: meaning all activities involved in gathering marketing intelligence and acting on the information.
2. The new-offering realisation process: Covers all activities in research, development and launching new quality offerings quickly and within budget.
3. The customer acquisition process: all the activities defining the target market and prospecting for new customers
4. The customer relationship management process: all the activities covering building deeper understanding, relationships and offerings to individual customers.
5. The fulfilment management process: all the activities in receiving and approving orders, shipping out on time and collecting payment.

3.2 Function of a selected work unit

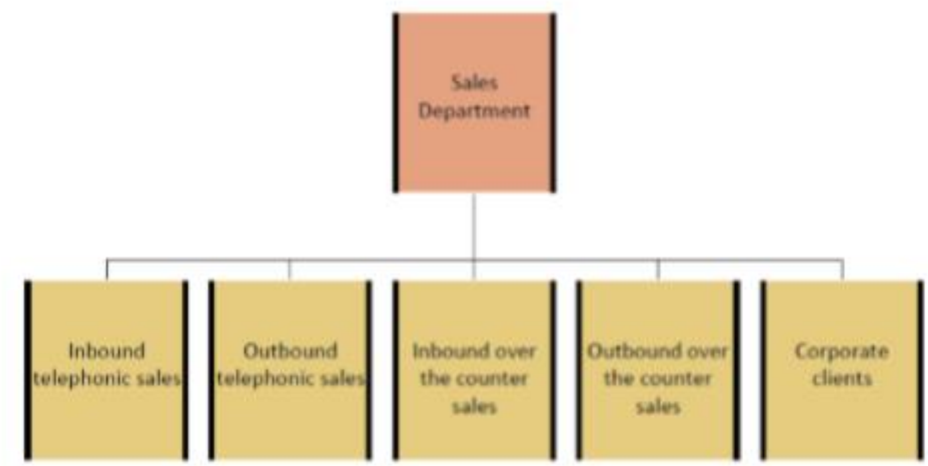
Work unit includes, but is not limited to, department, section, component and category.

Departments, sections, components

We have seen that business processes are divided into functions or departments, e.g. sales department, administrative department, HR Department, despatch, operations and so on.

When a business grows and becomes larger, it also becomes necessary to subdivide departments into smaller components. These components are called sections. For example, in the sales department, you could have the following sections:

- Inbound sales
- Outbound sales
- Mail order sales
- Corporate sales
- Telephonic sales



Categories

Category Management is a retailing concept in which the range of products sold by a retailer is broken down into discrete groups of similar or related products; these groups are known as product categories (examples of grocery categories might be: tinned fish, washing detergent, toothpastes).

Each category is run as a "mini business" (Business Unit) in its own right. It is based on the concept that a marketing manager is better able to judge consumer buying patterns and market trends by focusing on the entire product category.

With the introduction of Category Management in a business, the relationship between the retailer and supplier changes. The relationship becomes more collaborative where information is exchanged and businesses are built jointly and the turnover of the category as a whole is important, not only sales of individual product

Functions

Each work unit has specific functions to fulfil in the organisation. If we look at sales in an organisation, we see that sales is a core function, as it relates directly to the core business of an organisation. The purpose of the sales department is to sell the product or service of the organisation to customers. We have also seen that the sales department could be divided into smaller work units: sections, teams or categories.

Adding value

All the activities in a work unit combine with the activities in other work units to add value to the product or service.

You may well ask: “How do sales add value to the product?” It is of no use to the organisation if the product sits on the shelf and is not sold. Once the product has been manufactured and placed in the store or on the shelf, the selling price of the product is determined. This selling price includes all the costs of manufacturing or producing the product or service, plus an amount added for profit. Only once the product or service is sold does the business recoup the money it has spent and only then is the business able to pay the expenses and make a profit.

In this way all the departments in an organisation add value to products or services:

- Production takes raw materials and produces products,
- Quality control ensures that the products are of the required quality,
- Stores ensure that there are enough products to sell,
- Sales must make sure that the products are sold,
- HR must ensure that there are enough skilled employees to do all the work required
- Finances must make sure that money is available to pay the business expenses, etc.

Interrelationship When we discussed the business as a set of interrelated systems, we discovered that all the business processes, functions, departments, work units and activities in a business are interrelated: the output of one work unit becomes the input of another work unit.

Procurement (purchasing) has to make sure that there are enough raw materials and components to manufacture the goods. The output is therefore raw materials and components, as and when required by production. Production’s inputs are raw material and components, they process these to manufacture goods and the outputs are the manufactured goods.

The outputs from production become the inputs for sales – without goods to sell they have no work to do. The selling of goods is the process and the output from sales is goods sold (going out) and money coming in.

Finance need the output from sales – money coming in - as inputs in order to arrange for payment of expenses and purchasing of raw materials and components, etc. Their output – making money available for purchases, becomes the input for procurement, who have to make sure that production has enough raw materials and components to manufacture goods.

You can see that it is an ongoing cycle and, although we did not discuss all the business processes and functions, they are all interrelated. What happens in one work unit affects the entire organisation:

If the raw materials are delivered late, it affects:
- production, who cannot produce goods,
- sales who will not have goods to sell
- finance who will not have money to pay for the raw material, etc.

This then means that the activities of every work unit is important in achieving the goals and objectives of the organisation. If one work unit does not do what it should, it affects the entire organisation.

Notes:

Specific Outcome 4
Identify and explain the difference between the line and support functions within a selected organization

The departments or employees of a firm that perform the core activities and contribute to its business directly are called line function, for example manufacturing and marketing. On the other hand, the departments or employees that perform the support function and contribute indirectly to the business of a firm are termed as staff function example Human Resource Management and Finance.

Line function

- A line function is one which is involved in or contributes directly to the main business activity of a firm.
- Line functions are those activities that give definition to the organization structure and which ensure that the product or service is produced and reaches the customer at a profit.
- Regardless of the quality or degree of support they receive line management has the full and final responsibility for directing the activities of the people who comprise the organization, because line management is directly responsible for achieving results through those people.

Support function

Support functions are also called staff functions.
- Staff functions are those functions which help or assist line functions accomplish the primary objectives of the enterprise.
- Staff activities are indirectly related to the major objectives of the firm
- Staff functions assist Line managers in accomplishing their goals.
- The staff role is one of counsel, service, and advice.

Even though support functions are not directly involved with the core business of the organization, their work is still important:

Without the support of HR, the business will not have enough skilled and knowledgeable employees to produce the goods, purchase raw materials, sell the goods, etc.

Without the support of administration, the organization will not be able to keep stock of products, issue invoices, calculate selling prices, have records of sales and number of products produced, etc.

Formative Assessment Activity 3
Please open your Portfolio of evidence (Logbook) and complete the activities for this specific outcome, following the instructions found in your logbook.

Your facilitator will advise you as to the requirements and deadlines for completing and handing in these formative assessments. Write these instructions here:

Unit Standard: 242816
Conduct a structured meeting

When you have completed this section, you will be able to understand and explain the following:
- ✡ Prepare for a meeting
- ✡ Conduct a meeting
- ✡ Demonstrate strategies to deal with conflict in a meeting
- ✡ Follow up on a meeting

Minutes of meetings are the official records of what has occurred at the meeting. They record:
- ✓ The resolutions that were taken
- ✓ Decisions made
- ✓ Names of people who participated
- ✓ Any instructions / actions to be taken

The minutes remind us of:
- ✓ Who attended and what they were supposed to do
- ✓ Information for those who did not attend
- ✓ Can be used as policies and procedures
- ✓ Can be legally binding if approved

Minutes of Meetings must contain the following information:
- ✓ Full name of organisation
- ✓ The type of meeting that was held, e.g AGM
- ✓ The place, time & date of meeting
- ✓ Chairpersons & scribes name
- ✓ List of people who attended
- ✓ Those who sent in apologies
- ✓ Welcome & opening
- ✓ Approval of previous minutes
- ✓ Matters arising from previous minutes
- ✓ New Agenda items covered
- ✓ General items, includes items not in Agenda
- ✓ Closure

You can't just have a meeting without some logistical arrangements or you might be meeting by yourself!

You have been told by your manager to arrange a meeting for fellow site agents to discuss the upcoming Taxi Strike and the impact on your clients.
List below the arrangements that you have to make, by when & the people you would need to speak to:

Let's have a look at the duties of the different role-players in a meeting

The Chairperson
Before the meeting:

- The chairperson must make sure that the notice to attend the meeting has been sent out, with the agenda and the minutes of the previous meeting.
- Make sure that the venue is ready and any catering requirements organized.
- Be familiar with agenda and items to be discussed.

During the meeting:

- Make sure the meeting starts on time
- Discourage distracting behaviour eg. Talking out of turn, talking amongst selves
- Sign the minutes of the previous minutes once they have been approved
- Ask all speakers to address the meeting through the chair
- Ensure speakers receive a fair chance to speak within the given time frames
- Ensure agenda is adhered to.
- Close the debate on a topic if it goes onto too long
- Summarise discussion points if necessary
- Use Chairpersons casting vote when votes from the floor are equal

After the meeting

- Ensure minutes are typed up
- Proof read minutes before it is sent out
- Ensure that minutes are distributed

Duties of the secretary / scribe

- Keeping all records of the meetings
- Keep attendance registers if required
- Keep the correspondence file
- Sends out notices, the agenda & the minutes

- Books venue and arranges catering
- Takes minutes of the meeting
- Records votes taken in meeting
- Prepare agenda for next meeting

Duties of the participants in a meeting:
When being asked to attend a meeting you immediately have duties to perform.

- Give apologies if you cannot attend
- Participate by getting involved in discussions
- Be on time
- Behave correctly – be professional
- Listen to what is being discussed
- Respect others viewpoints
- Be sensitive
- Speak clearly
- Be aware of your body language & tone of voice

Do you know what a mandate in a meeting is?

Let’s have a look a minute’s template:

(1’st, 2’nd, 3’rd MEETING OF THE ....
TO BE HELD IN ....AT ABC SHOE FACTORY
ON MONDAY, ...AT 09H00

Present:	………………………….. ………………………….. ………………………….. ………………………….. …………………………..	**Apologies:**	……………………………. ……………………………. …………………………….

WELCOME / INTRODUCTION

……………….welcomed those present and declared the meeting duly constituted.
Apologies from those unable to attend were noted.

The agenda was adopted and minutes of the previous meeting were verified as a true record of the proceedings.

MEETING DULY CONSTITUTED

2.1. Meeting is constituted

APOLOGIES

3.1. Apologies noted in terms of …………………………..

ADOPTION OF AGENDA

Agenda was accepted.
…………………recommended that the following items should be added under the standing items column.

MINUTES OF THE PREVIOUS MEETING HELD ON ………………… To verify and sign as a true record of proceedings.

Minutes of the previous meeting of …………….., were accepted by all the members present and was signed by the chairperson.

DECLARATIONS OF CONFLICT OF INTERESTS AND DISCUSSION

Has anyone any matter to declare which might fall into the category of Conflict of Interest?

MATTERS ARISING

No matters arising from the previous minutes were discussed.

AGENDA ITEMS FOR DISCUSSION

8.1.
8.2.
8.3..

STANDING ITEMS

9.1. Composition of the board/members, (PDI/50%)
9.2. Conflict of interest,
9.3. Chamber/department finance,
9.4. SSP/chamber/department targets and progress to date

GENERAL

10.1. No additional items were added to the agenda for discussion, which were not reflected in the original agenda.

FUTURE MEETING DATES The future meeting dates are as follows:

27 August 2010 @ 10:00
5 October 2010 @ 10:00

CLOSURE

12.1. The meeting was closed by the chairperson at 09:00

Chairperson ____________________ DATE ____________________

Specific Outcome 2
Conduct a meeting

In this section, learners will be required to chair a meeting in their workplace and produce the agenda, register and minutes from that meeting for their portfolios of evidence.

Agendas may take slightly different forms and be presented in different levels of detail but should set out clearly the items to be dealt with and discussed. There is a fairly standard order for most agendas in terms of the opening and closing items with variation in the middle which represents 'the meat'. Two examples of typical agendas for an Executive Committee are given below:

1. Call to Order
2. Minutes of the Previous Meeting
3. Reports of Officers
4. Reports of Committees
5. Old Business
6. New Business
7. Announcements
8. Adjournments

OR

Executive Committee Meeting

There will be a meeting of the Executive Committee on Tuesday, 29 June 2005 at 1400 hours in the Board Room of Alpine Trading

T Davies
Secretary

12 June 2005

AGENDA

1. Apologies for absence
2. Minutes of the previous meeting
3. Matters arising from the minutes
4. Report on the Saudi Arabia Project (Paper 22.1)
5. Arrangements for the Royal Visit
6. Progress report on introduction of the new MIS

7. Safety Report (to be tabled)
8. Early retirements (Paper 22.2)
9. Any other business
10. Date of next meeting

An agenda is simply a list of 'things to be done' at the meeting (in the order in which business is to be transacted) which is prepared by the secretary, usually in consultation with the chairperson. However, without proper preparation of an informative, purposeful agenda the effective running of meetings is not possible. It is usual for committee members to receive their copies of the final agenda together with any supporting documents (often referenced in brackets following the agenda item) sufficiently in advance of a meeting to provide them with the opportunity to study the material carefully, do any necessary research, perhaps liaise with one another over certain items and come to preliminary agreement over matters to be discussed, even in advance of the meeting!

The aims of the agenda are as follows:

To confirm the time, date and place of the forthcoming meeting
The time, date and place of regular meetings will have been announced on the bottom of the minutes of the previous meeting. Reinforcing this at the top of the agenda confirms the position and also gives the opportunity for change should there be a change of circumstances. However, if the time, date or place has changed we would recommend that a covering memo accompanies the agenda, clearly setting out the change, as people are too commonly prone to ignoring the 'regular details' at the top of agendas (even in companies with a good meetings culture; in companies with a poor meetings culture people will probably not even bother to read the agenda until they are sitting in the meeting).

To give members, prior warning of what will be discussed at the meeting
When members are given an indication of the subjects to be discussed they will be able to prepare for their contributions more effectively. This can therefore be likened to a menu.

To guide members through the meeting, indicating subjects that will be discussed in the order in which they will be discussed
The agenda also serves as a timetable. People should know roughly the times at which each item will start and end. This will give a planned structure to the meeting and allow the chairperson to make certain decisions about who should be at the meeting, and when.

There is also a psychological component to this. If people making presentations do not know when they are going to be called to give their talk and if they are suddenly called upon by the chairperson to do so, they might become flustered or even panic and might make a long and rambling, ineffective presentation when with some internal preparation they could have made a shorter but more effective presentation. If a person is to make a presentation in, say, item 6 on the agenda then she may well be very relaxed during item 4 but during the discussion of item 5 – albeit subconsciously – will prepare her body for the presentation. Her breathing will slightly increase she will force herself to be more alert and so on. There is a warning here for potential chairpersons; if you decide to move from point 4 straight to point 6 then it would be advisable during the debate on point 4 to alert the people concerned with the presentation of point 6 that you are going to do that and to give them time to 'psych themselves up'; this will make for a more energized and focused presentation, which is to your advantage.

To present a manageable list of items which, can be adequately discussed in the time available

The lesser used function of the agenda is a production target. It is by the recognition of this use of the agenda that meetings can be most easily energised. In rare cases companies have an ever-growing list of agenda items which are never discussed. Each agenda has 40 items on it, of which ten or twelve are always discussed and the rest are carried forward 'for future discussion' (i.e. never). People involved in those discussions become demotivated and certainly never prepare for their presentations, knowing they will not have to make them. In the event that they ever did have to, their unprepared presentations would be ineffective. The production target mentality suggests that rather than debating 12 out of 40 items a good chairperson should put, say, 15 items on the agenda with a determined effort to debate them all. By increasing the numbers being discussed and keeping people focused on the timetable the backlog of items will be gradually eliminated. Through the use of production target mentality, such a backlog would never arise again.

More usually in companies, meetings have a huge amount of subjects but little time to discuss them, i.e. the meeting starts at a certain time but finishes when everyone is bored or unconscious, or the 'school bell' rings. A good chairperson should be able to calculate the approximate time needed for a healthy debate on any subject and should structure the meeting accordingly. In most companies meetings that take three hours can be just as effectively, even more effectively, debated in two and a half hours. Remember that a half-hour saved with 20 people round the room is ten staff hours of people in meetings tapping their fingers and asking the question 'Why am I here?'

When the agenda is used properly people will be in meetings only when they are needed, will be constantly aware of deadlines and will learn to make more concise presentations. All of this has a two-fold effect; first, in the meeting people will feel active rather than bored, and this will increase their appreciation of meetings, not least because better decisions will arise; second, outside the meeting people will have more time to get on with other work rather than feeling that they are being distracted by 'tedious and boring' meetings. The purpose of the effective agenda is to release people from unplanned time into planned time outside the meeting.

Specific Outcome 3
Demonstrate techniques to deal with differing views during a meeting

It is important to understand that conflict will occur no matter how successful your meeting may be planned or conducted as you are dealing with differing ideas and opinions and people.

Dealing with conflict should be seen in a positive manner as it enables you to deal with and solve issues upfront that could manifest at a later stage and cause even bigger problems in your Team.

It is necessary to understand why conflict occurs and the steps needed to resolve these issues.

Differences in opinion – This is normally the primary cause of conflict in meetings and not necessarily a bad thing. Imagine how boring life would be if everyone agreed on everything. However, differences in opinion cannot be allowed to degenerate into personal issues so this must be controlled by the Chairperson.

Differences in personal makeup – No, we are not talking about lipsticks and powder! We are human beings and sometimes we just dislike someone to the extent that we let our feelings for that person colour our judgment in making a decision.

Cultural differences – people who have been brought up differently will also have different beliefs and different ways of doing things.

Defusing conflict in meetings

The role of the Chairperson is to control the meeting and keep it on track. Therefore, the Chairperson should not actively participate in discussions as he is there to initiate discussion and control the flow of information and input. This is also why having an agenda upfront is so important.

Here are some tips on successful control of meetings:

- Be firm – You must not allow the meeting to get out of control, and for this reason, you must be firm with the participants who do not conform to the rules. If this includes ejecting unruly people, do it!

- Be fair – never appear to take sides. Allow people to have their say, but keep them to the point and not let them digress from the agenda.
- Be objective - View the discussions as if you were someone else and keep YOUR emotions strictly under control. A chairperson should enjoy the respect of the participants but remember respect is earned and you will gain it by have effective & productive meetings.
- Be respectful – treat your participants with respect, even when the opposite might not be true.
- Do not allow things to become personal – Participants who get emotional and launch personal attacks on others must be halted immediately.

Here are some pointers in maintaining control:

- Get in early – don't want to intervene when it is too late
- Humour – a touch of humour could defuse potential problems
- Cut in – You have the right as the Chairperson to cut in and summarise the positive points from both sides. While you are doing this, the emotional participants have a chance to simmer down.
- Take control – by asking questions to a particular combatant, enforcing the rule of "speak through the chair"
- Reminder – remind participants that you have an agenda and time frames to work within.

NOTES:

Specific Outcome 4
Distribute records for a meeting

Just because a meeting is over, doesn't mean that your work is completed. Follow up to meetings is very important otherwise the work done in the meeting could be lost.

Following up includes:

- Getting the minutes typed up
- Proof reading for accuracy
- Ensuring minutes are distributed
- Reviewing the meeting – for your own benefit so that you can learn from any positive or negative areas that arose from the way they meeting was conducted.

Distribution of Minutes
Minutes should ideally be distributed within 48 hours of the meeting to members who were able to make the meeting as well as those members who were unable to attend. If minutes are distributed much later people will often, in the short-term, have had discussions on the subjects of the meeting which will have advanced the debate beyond what happened at the meeting. They will then challenge the minutes or ask for them to reflect things which did not happen in the meeting. Many of them will genuinely believe they had these debates in the meeting when in fact they were outside. If the minutes are distributed within 48 hours people can clearly distinguish between discussions that arose in the meeting and those that arose afterwards.

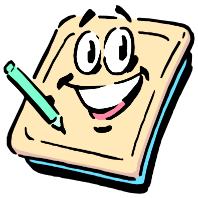
Minutes may be distributed in many ways it all depends on the organisation.
Ways in which minutes can be distributed is as follows:

- Via e-mail
- Printing of minutes and placing in person in box/pigeon hole or on their desk
- Faxing
- Posting

Formative Assessment Activity 4
Please open your Portfolio of evidence (Logbook) and complete the activities for this specific outcome, following the instructions found in your logbook.

Your facilitator will advise you as to the requirements and deadlines for completing and handing in these formative assessments. Write these instructions here:

Self-Evaluation



Complete the following Self-Evaluation to see if you are ready to start the next module:

Standard / Legend:

Above average Competence	5
Competence – Meet the standard	4
Almost there	3
Not quite there yet	2
Still need to improve in this area	1

By the end of this module I feel that I can do the following:

Define a problem.	
Investigate the problem.	
Generate problem solutions.	
Implement problem solution.	
Evaluate the effectiveness of the solution.	
Prepare for a meeting.	
Conduct a meeting.	
Deal with differing views in a meeting.	
Distribute records of a meeting.	
Explain why organisations record and keep information.	
Identify and describing the type of records a team leader is required to keep.	
Record team performance against agreed targets.	
Record performance data.	

What I would have liked to spend more time on:

Annexure: No 1
Training Evaluation

Please complete this form and tear it out and leave it on your facilitator's desk before leaving the course on the last day.

Your honest and helpful opinions will only contribute to making this course even better in the future. Thank you for taking the time to be with us on this **Management Planning Skills Programme**.

Ratings:

1	Poor
2	Areas for Improvement
3	Meet the standard requirements
4	Very Good
5	Excellent

Was the facilitator: ………………………Tick where appropriate	1	2	3	4	5
Prepared for the training					
Knowledgeable of the subject matter?					
Able to handle all the questions posed by the delegates?					
Able to interact with the delegates?					
Voice clarity of the facilitator?					
Able to use the training aids (flip charts, hand-outs, etc.) effectively?					
Dis the facilitator make the training exciting?					
Would you recommend the facilitator for future training?					

Other comments on the facilitator's delivery of this training:
