



Unit 5

Strategic planning

Learning Outcomes

By the end of this unit the learner will be able to:

- ✓ Enhance your ability to communicate with others in meetings and through presentations.
- ✓ Create an action plan for managing your career success

Unit 5

Strategic Planning

SWOT Analysis

Generally, there are several critical steps to an effective strategic planning session. Most important is the SWOT analysis, where the members of your management group or team attempt to identify the assets and liabilities of the organization as they look to the future. This is the first step toward creating that shared vision that is so critical to your ability to lead.

SWOT stands for the strengths, weaknesses, opportunities, and threats facing your company. The strengths and weaknesses are usually considered to be internal, while the opportunities and threats are generally external to the company. This analysis helps you ask yourself, “Where are you now?” This is really your situation analysis or inventory, and it gives you an opportunity to take stock of the overall situation right now before planning any future changes.

	INTERNAL	EXTERNAL
POSITIVE	Strengths	Opportunities
NEGATIVE	Weaknesses	Threats

A SWOT analysis should consider:

- Your company and its strengths and its weaknesses
- Your products and/or services and their strengths and weaknesses

- The community and what is currently going on that may affect future planning
- Your primary and secondary target markets and what they want/need
- The competition and what they are doing
- The external forces that will affect your business
- Opportunities that are available to you and your company
- Environment and market factors that could threaten your business

Individual Analyses

	<i>INTERNAL</i>	<i>EXTERNAL</i>
<i>P O S I T I V E</i>	Strengths	Opportunities
<i>N E G A T I V E</i>	Weaknesses	Threats

Doing Delegation Right

What is Delegation?

Effective delegation is one of the most valuable skills a manager can master. It reduces a manager's workload and develops employee skills. Delegating prepares employees who work for you to be able to handle your responsibilities and simultaneously allows you to advance to other career opportunities within your organization.

The essence of supervision and management is getting work done through the efforts of others. Therefore, the supervisor or manager can decide (and must decide) what they are responsible for directly (those things they cannot delegate and empower others to do) and what others can do. They still maintain the authority, but they have passed the responsibility to someone else. They have empowered them to do those things.

Delegating involves trusting someone else to do a task for which you will ultimately be held responsible. It is not giving them tasks to do. Rather, delegation is systematically delegating whole jobs to people who work for you.

What is responsibility?

What is accountability?

Group Definitions

Identify the advantages of becoming a good delegator.

Identify the concerns that keep you from delegating tasks.

Identify the types of jobs that can and should be delegated.

Identify jobs that managers should not delegate to others.

Identify the signs that tell managers they are not delegating properly.

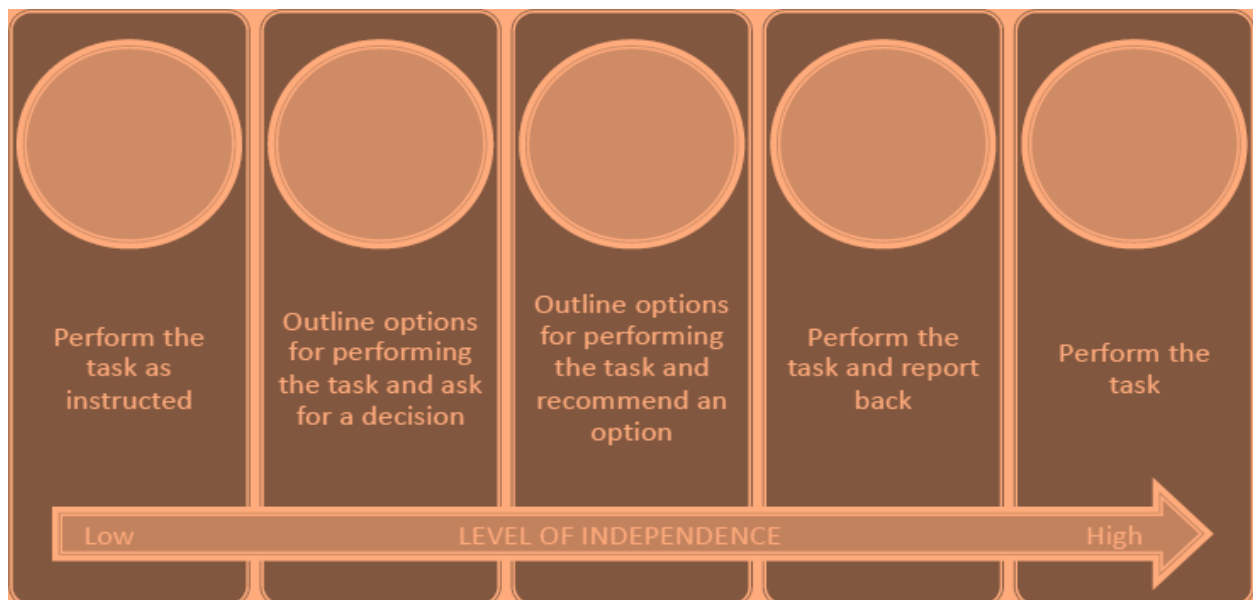
Identify some reasons why employees may be reluctant to accept assignments that a manager has delegated.

Levels of Delegation

The Five Levels

Delegation doesn't have to be all or nothing. In fact, you should consider what level of delegation is appropriate for the task, the employee, and the situation.

Here is an overview of the five levels of delegation:



Breaking Down the Model

Let's say that we want an employee to prepare a summary report of their work over the past year that will be submitted to the executive team. How will each level of delegation look?

The **first level of delegation** is to have the employee perform the task exactly as instructed with no independence. In our example, we might give the employee a report template, the data, and similar reports. Then, we'll ask them to complete the report and submit it by a certain date.

The **second level of delegation** is to allow the employee to do some research (if necessary) and then give you options for the task. You make the decision and the employee completes the task according to your instructions. In our example, the employee might research different formats and give you some different options. They may also draft a list of items that they want to include in the report. Then, you will outline the format and contents for them. They will complete the report and submit it by a certain date.

The **third level of delegation** is similar to the second, except that an employee makes a recommendation. Continuing with our report example, the employee would recommend a format and possibly prepare an outline. You would approve it and ask the employee to complete and submit the report.

The **fourth level of delegation** is where independence really comes into play. This is the level that you will use most often once team members get up to speed. With our report example, you would simply ask the employee to complete the report and submit it by a certain date. (They may use existing procedures or templates, but the bulk of the decisions are up to them.) You would then review the report, approve it, and send it to the executive team.

The **fifth level of delegation** gives the employee complete freedom. With our report example, you would ask the employee to complete the report and submit it directly to the executive team. You may ask the employee to send you a copy of the report, but you would not have any active role in it.

Delegation Role Plays

Delegator

Assume you are going on a four-week cruise vacation. Your manager has made it clear that in order to get so much time off you must train somebody else to do your job in your absence. In a short role-play, go over several of the most important tasks that he/she will be performing in your absence.

You may choose to teach any relevant tasks, such as how to complete a report or run a machine. Your goal is to teach this employee how to perform several tasks that will be delegated to him/her in your absence. You may do this in any way that will be comfortable for you.

Take several minutes to plan your instructions before you start.

[illegible]

Delegatee

Assume that your boss is going on a four-week cruise vacation during which you will need to do his/her job in his/her absence. In a five-minute role play, you and your boss will go over several of the tasks that you will be performing for the first time in his/her absence. This is your only opportunity to learn how to do this work so make sure that you understand the instructions. Be sure you are clear about what you will need to do in his/her absence.

Take several minutes to prepare for the instructions you are about to receive.

[illegible]

Observer

While the delegator gives his/her instructions to the delegate, watch the interaction.

What improvements could be made on both sides?

Criteria for Useful Feedback

The old management and leadership texts used to say that whenever giving feedback, you need to compliment someone or something they did first. This was meant to break the ice and ease any tension. However, what tends to happen is that people know they are coming for feedback, and they can be so focused on the criticism coming up that they do not hear your compliments, or they prefer that you get down to business.

Know your people, and how they prefer to receive feedback, and you will become very effective at delivering it.

Here are some of our best practices for offering feedback.

- Keep the conversation **positive**. Even when you have to deliver negative feedback (or outright bad news), the conversation should remain respectful, positive, and preserve the integrity of the people involved. Being positive gets the person in a better frame of mind to hear the other side.

- Feedback should be **asked for or agreed upon** ahead of time, rather than imposed. If it's appropriate, let people know that you'd like to give them some feedback and what the agenda for the discussion is so that they can also prepare if needed.
- Effective feedback is **well timed**. In general, feedback is most useful at the earliest opportunity after the given behavior.
- Feedback should be **specific** rather than general. To be told that you are dominating would not be as useful as to be told that, "Just now when we were deciding the issue, you didn't listen to what others said, and I felt forced to accept your arguments or face attack from you."
- Feedback should be **descriptive** rather than evaluative or judgmental. Describing one's own reaction leaves the other person free to use that information or not, as they see fit.
- Feedback should be directed toward **behavior** the receiver can do something about.
- Feedback should **take into account the needs** of both the giver and receiver of feedback. Feedback is destructive when it serves only the giver's needs and fails to consider the needs of the other person.
- Check that your **feedback is clear** to the receiver. One way of doing this is to have the receiver summarize the feedback in his/her own words.
- When feedback is given in a group, both giver and receiver have the opportunity to **check with others in the group** on the accuracy of the feedback. Is this one person's impression or an impression shared by others?

The performance feedback that you provide your people may be on a group level in terms of how well they are meeting targets compared to other groups, or it may be about individual performance toward attainable goals. Remember, just as feedback is necessary to keep a rocket on target and interest in a sport alive, it's also an important way of keeping employees interested in their work.

How do you rate your ability to give feedback effectively?

Is there anything you should change? How might you get started?

Feedback Techniques

Feedback Techniques

Feedback has traditionally been given in the “**sandwich**” format.

In the sandwich, you begin by saying something positive about the person’s behavior, such as, “Roger, you are one of the fastest workers in here. You understand computers better than most of the people I work with.”

Then comes the description of the behavior you want to see changed. For example, “I would like you to be more precise with your documentation. You come up with brilliant solutions that never get recorded and I’d like you to change that.”

Back to his value to you and the company: “You have knowledge that the rest of us could use, and you don’t always get credit for the ideas you have. Can I count on you to do more documentation?”

We prefer a more **open-ended approach**. When you use this technique, there is no lead-in. You move right to telling the person what behavior has to be changed. For example: “Roger, I would like you to be more precise with your documentation. You come up with brilliant solutions that never get recorded and I’d like you to change that.”

Then remind him of his value to the organization: “You have knowledge the rest of us could use, and you don’t always get credit for the ideas you have. Can I count on you to do more documentation?”

Of course, it is critical that your feedback is always sincere, with the intent of improving behavior.

You can also just give an **individual positive feedback statement** as well, such as: “Roger, you are one of the fastest workers in here. You understand computers better than most of the people I work with.”

Occasionally you can give the individual the **constructive criticism** without any positives to go with it. Example: “Roger, I would like you to be more precise with your documentation. Your solutions never get recorded and I’d like you to change that.” Just don’t use this technique very often.

Here are some tips that you can use to **encourage feedback**:

- Reward the person who asks a question.
- Set aside time for regularly scheduled feedback sessions.
- Use silence to encourage feedback.
- Watch for non-verbal responses. Most people cannot hide or censor their non-verbal responses.
- Ask open-ended questions.

Other Ideas

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

Role Play

Situation

Three weeks ago, you delegated the task of the monthly financial report to your assistant. S/he submitted it this morning. It looks great: new format, extra information, and statistics that update automatically. The problem is that you didn't ask for a new format; the old format is a standard across the company and must be used. You need to figure out how to deal with the situation and give feedback so this doesn't happen again.

Mastering Your Body Language

In significant (though often misinterpreted) research, **Albert Mehrabian** found that when it came to discussing emotions, only 7% of the speaker's message was communicated by words, and that tone of voice was responsible for about 38% of the meaning and body language about 55%. This means that the words themselves played only a very small part in conveying meaning. In other conversations (not the ones about emotions), we know that tone of voice and body language have a large impact on those messages, too.

We are always sending signals to others, whether we like it or not. Body language combined with vocal tone can override or even cancel the meaning of the words we say. If you want your messages understood, make sure your words and your body are sending the same signal.

Here are some things to keep in mind about body language:

- Your **eyes, eyebrows, and mouth** send out the signals that can make a world of difference.
- People who smile are happier than those who don't. **Smiling** releases a chemical in your brain that makes you feel good. It's a great way to establish a rapport with listeners.
- **Eye contact** helps you carry your message to each person in the audience. It builds trust.
- Learn to speak with your **hands**. Draw lines in the air, make a point, count on your fingers, and emphasize length and width.
- Work on appearing **sincere and comfortable**.
- Let your **hands** do what they want to do, as long as they don't get in your pockets, fiddle with an object, or make obscene gestures to your audience.
- Your **body posture** affects your emotions and how you feel determines your posture. If you are confident, happy and ready, your body will show it.

One of the most important things you can do with body language is learn to pick up **cues** from people that you are making them uncomfortable, such as:

- Rocking
- Leg swinging
- Tapping

These are the first signals of tension and indicate that the person feels intruded upon or nervous. If it escalates, these signals are often followed by:

- Intermittent closing of the eyes
- Slight tucking of the chin into the chest
- Shoulder hunching

Basically, learn to watch for these cues, and then **adjust your approach**. Sometimes just taking one step back, or getting the other person to talk to you instead, will be all it takes to ease the tension. If you sensitize yourself to these simple cues, over time people will feel more relaxed, at ease, and open with you (and to you).

Meeting Management

Preparing for Meetings

Careful preparation can make the difference between feeling confident and in control, and coming out of a meeting feeling really unhappy about the way it's gone.

You should get an agenda before each meeting and a set of minutes afterwards. The agenda needs to be detailed enough for you to know whether anything important or contentious is coming up. You also need to receive it in plenty of time to be able to consult colleagues or seek additional information if you need to. If there is anything you want to put on the agenda, don't be afraid to. (It is a good idea to find out early on how you should go about doing this as practice will vary between organizations.)

Reading the Reports

In some organizations, you will receive reports which form the basis for discussion on various issues. Sometimes these are quite concise and sometimes they can be quite bulky. The time that you want to spend reading things like this will be limited, so it's important that you approach the task systematically and develop your ability to digest the material.

- When the reports arrive, scan them quickly to establish the scope and content.
- Write down any initial questions you may have and look for answers in the subsequent stages.
- Read conclusions, summaries, and recommendations first.
- Highlight sections you will want to refer to.

You can develop the ability to read faster by:

- Concentrating
- Never going back on a sentence
- Using a ruler to keep you on a line
- Not reading each word mentally

- Being on the lookout for important areas
- Always marking useful sections (highlighter, post-it notes, markers)
- You can use a code to remind you (For example: 1 = interesting, 2 = important, 3 = vitally important)

Once you have read the reports, put them to one side and try to write out the key issues and ideas in your own words. Then try these tips:

- Reread the document and check your understanding.
- Establish your own objectives, which should be your measurable targets for the meeting.
- Write them down.
- Identify what you want to do on each item. (Remember, what you say on one issue may have an effect on other issues, so pick your issue carefully.)
- Prioritize.
- If you are going to speak on an item make a note of the things you want to cover.
- Check your understanding with others.

Questions to ask yourself when preparing for a meeting include:

- What information do you need to take with you?
- What do you want to get out of the meeting?
- Is there something in particular you want to get done?
- What contribution do you want to make?
- Are you just trying to get information?
- Do you want to follow up something that was raised at an earlier meeting and check progress on it?
- Do you just want to draw attention to something?
- Do you want to make sure people are aware of a problem so that it doesn't happen again?

During the Meeting

Keep your contributions short.

Your point is more likely to be understood and to have an impact if you keep it reasonably short.

Don't take so many notes that you lose track of what is going on.

Most meetings are minuted so just write down the things that affect you (such as things that you are responsible for doing before the next meeting) or things that will jog your memory when it comes to reporting back to your employees or supervisor.

Avoid interrupting others to make your contribution. Do not let others interrupt you.

In some meetings it is difficult to get your contribution in. If you do have to interrupt, do so firmly and politely. Once speaking, do not be tempted to make several points for fear of not getting in again.

Think about your non-verbal behavior.

Both the volume and tone of your voice are important here. If you are too quiet you will lose impact and be open to interruptions. Eye contact is also important. Remember to sit somewhere that makes it easy to catch the eye of the chair so that you can get your contribution in. While you are speaking, distribute your eye contact throughout the meeting, but direct it at those for whom your contribution is most relevant. This enables you to judge how your contribution is being received.

Time your contributions.

Raise points at the relevant time for the maximum impact. Do not wait until the last minute before airing an opposing view. If others are on the verge of making a decision, they will be irritated if you suddenly come up with opposition.

If you are brief and avoid interruptions you stand a good chance of getting a reaction. If no one reacts, however, don't be shy about asking the meeting or an individual for a reaction.

If you are asked to give an opinion on something that has come up unexpectedly, don't feel pressured into giving an off-the-cuff answer if you are not confident that you know your own strengths. It is perfectly acceptable to ask to be given time to think about it.

Managing Meetings

People spend endless hours in meetings that are poorly planned, ineffectively conducted, and go nowhere. Arthur Ciervo of Pennsylvania State University estimates that the average manager spends 14 to 20 hours a week in meetings and that half those hours are wasted. A key part of learning to be a manager is learning how to make the most of meeting time.

If you are a meeting leader, here are five ingredients for managing those meetings effectively.

A leader and a group committed to resolving issues, not just talking about them. How can you make sure this happens?

A meeting that focuses on important issues and guides the group in resolving them. How can you make sure that happens?

A leader and members who have been trained in the skills needed to work together effectively. What skills do you need?

A means for recording ideas and keeping track of what goes on. How will you do that?

A meeting location free of interruption from other activities. Where can you hold your meetings?

Presentation Tips

9 Secrets to Command Attention

- 1) Dress in a professional manner
- 2) Walk to the podium with confidence
- 3) Stand erect behind the podium
- 4) Look at the audience and pause before you start to speak
- 5) Project your voice to speak with authority
- 6) Convey dynamism
- 7) Begin with a powerful introduction
- 8) Establish your credibility early
- 9) Leave the podium with a confident, purposeful gait

10 Secrets to Control Fear

- 1) You can never prepare too much

- 2) Be totally familiar with your introduction
- 3) Practice out loud and practice often
- 4) Practice mentally
- 5) Record your speech
- 6) Concentrate on your message, not on yourself
- 7) Know that to feel nervous is to be human
- 8) Breathe deeply
- 9) Channel your adrenaline into positive energy
- 10) Know that you appear more confident than you feel

10 Secrets to Build Credibility

- 1) Dress to convey authority and professionalism
- 2) Project your voice
- 3) Share your credentials
- 4) Use quotations or testimonies
- 5) Offer statistics
- 6) Use examples and case studies
- 7) Compare or contrast ideas
- 8) Use visuals
- 9) Restate ideas in a variety of ways
- 10) Deliver the message dynamically

10 Secrets to Prepare Like a Pro

- 1) Check out the speaking environment prior to your presentation
- 2) Change the environment to fit your style if necessary
- 3) Use the three-minute prep for unexpected speeches
- 4) Use sheets of paper for notes, not note cards
- 5) Use nouns as notes to jog your memory
- 6) Time your speech and edit, edit, edit
- 7) Select a title that's a hit
- 8) Prepare your introducer with an exciting introduction
- 9) Anticipate questions from the audience
- 10) Have questions ready

8 Secrets to Close with Power

- 1) Summarize your main points
- 2) Refer to the occasion
- 3) End with a powerful quotation
- 4) Make a startling statement
- 5) Leave listeners with a vivid illustration
- 6) Issue a challenge or an appeal
- 7) Keep a second closing in reserve
- 8) Leave the podium with a confident, purposeful gait

10 Secrets to Sharpen Your Delivery

- 1) Speak clearly
- 2) Vary your pace
- 3) Use silent pauses often
- 4) Limit the use of vocalized pauses
- 5) Vary your inflection
- 6) Look at everyone frequently
- 7) Use movement to maintain attention
- 8) Use natural gestures to generate interest
- 9) Hide your errors
- 10) Leave playthings at your seat

Pumping up a Presentation

Public speaking is an opportunity that leaders must learn to grasp at every opportunity.

It gives you a chance to establish yourself with the community and tell people about your company. Whether you are making a sale, pitching your idea to the boss, or managing a crisis, effective speaking skills are critical to building credibility and driving your message home. People want to do business with people they like and trust.

Even the most secure speakers shouldn't wing it. No matter how well you know your product or service, it pays to plan. Think about what's most relevant to your audience and put their interests first.

Luckily, no presentation has to be perfect. The numbers of people who aren't good speakers far outweigh those who are good, so there's lots of room for those who are just OK at public speaking.

However, if you want to move your presentation from dull to dynamic, you can pump up your presentation in seven easy steps:

- 1) **Talk to yourself.** Practice in front of a mirror, trying to look relaxed and friendly. Stand with your arms in front of your body, with your elbows at 90 degrees and your palms at 45 degrees, leaning forward. That says, "I'm here, I'm engaged, and I don't have a weapon."
- 2) **Have a point.** Decide on your core message ahead of time. Bring the listener quickly to the point of action by crafting your theme into your introductory passages.
- 3) **Look them in the eye.** Making frequent eye contact for a few seconds with listeners in the audience will create an aura of confidence and familiarity, which will help you get your message through.
- 4) **Know the room.** Boost your comfort level by checking out your speaking venue in advance. Practice with the microphone and any visual aids that you plan to use.
- 5) **Crack a smile.** Smiling tells the audience you're enthusiastic and confident—just the kind of person they want to hear. Smiling can also relax you, reduce your heart rate, and help you breathe easier.

- 6) **Pump up the volume.** People need more energy than they think to make a strong presentation. Use a louder voice than you think you need.
- 7) **Don't be a comic.** When you tell a joke, you might offend somebody. Tell a funny story about yourself instead.