

Pathways to Management and Leadership

Certificate in Management

Case study for Unit C31

Developing yourself in a management role

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Case study for Unit C31

**Developing yourself in a
management role**

Introduction

This case study, with the accompanying questions and feedback, is one of ten designed to support your study of the core and optional modules of the Chartered Management Institute's Certificate in Management. It is designed also to support and complement your reading of the relevant workbook in the *Pathways to Management and Leadership* series that you may be using as you study for the qualification.

The workbooks are intended to provide you with the underpinning knowledge you will need to gain the Certificate, enabling you to apply the knowledge you have gained in your workplace and job-role.

The case studies have been developed as an additional resource for you to use either on your own, or with the support of your tutor and Centre, to add depth and breadth to your experience, knowledge and understanding of the individual units. They describe realistic and often challenging situations, enabling you to develop your understanding of the knowledge and skills you need to develop as a manager. Together with the advice and information provided in the *Student Guide*, they will help you to prepare for the kind of assessment that takes place within the Certificate programme.

Aims of the case study

The case study, the questions, and the subsequent feedback, are all aimed at promoting deeper learning of key aspects of the Certificate in Management curriculum. It will provide you with the opportunity to reflect upon real aspects of the business environment, and on some of the challenges faced by you as a manager in your day-to-day work. This opportunity to look at typical situations will help you to apply to real-life contexts the knowledge and understanding gained from reading the relevant workbooks, and from study with your tutor and Centre. Exploring the case study will also encourage you to try out some of the different management tools and techniques that you have studied.

The case study is accompanied by a series of questions and/or tasks that will not be unlike some of the activities that you might have to undertake for assessment purposes, so they will be good preparation for you. Once you have read the case study material and tried to answer the questions or complete the specified tasks, you will find that there are some *Comments and reflections* relating to the kinds of responses you might have made. These are phrased in general terms, because each person's responses are likely to be different, depending on their work role, organisational context or the sector they are in. In addition to the feedback, you will also find a section entitled *Where to go from here*. This section provides you with links and cross- references to aspects of the other units and workbooks,

and direct you to some further reading or sources of information that you might usefully follow up.

Overall, using the case studies will hopefully be an exciting, challenging and interesting way for you to develop your knowledge and understanding of the units on the Certificate in Management programme. They should enable you to demonstrate that you have provided evidence for the achievement of the Unit *Learning Outcomes* in your assignment work.

Background to the case study for Unit C31

This case study will help you to focus on the importance of taking stock of your current management skills, and on considering how you can best develop these skills. As a manager, you need to manage your time, create effective working relationships with your colleagues and ensure that your staff know what is expected of them in terms of their work activity, and their general behaviour. The situations you will read about highlight the need to develop these skills and offer opportunities for you to consider *how* this may be achieved, using a variety of tools and techniques that will help you to build your skills and competences. In particular, the case study will offer you the opportunity of putting yourself in someone else's shoes, and exploring a situation that may be quite similar to your own.

If you are studying for the Certificate, you will be assessed by your Approved Centre on your knowledge and understanding of how to:

1. Assess your leadership style, and preparing and managing your self-development plan.
2. Plan and manage your own time.
3. Create and manage working relationships with line managers, colleagues and team members.
4. Inform people of expected standards of work and behaviour.

Now read the following case study and try to answer the questions and complete the tasks that follow. This activity should take you between three and four hours to work through. Do not worry if it takes you a little more or less time than this, as much will depend on your existing knowledge and experience, as well as your own particular work and organisational context.

Unit C31 **Developing yourself in a management role**

A new Deputy Manager at Midshires County Council's Neighbourhood Centre

Background

Midshires County Council is one of the new unitary Councils established in a major Local Government change, which brought together the work of three, much smaller County Councils. As part of their customer-focused strategy, Midshires have introduced across the County a series of 'One Stop Shops' to provide information and services to their customers, with the aim of providing a much more local 'point of delivery'. These new 'One Stop Shops' have been designated as Neighbourhood Centres.

Each of these Centres is located in a purpose-built building and is run by a Centre Manager and a Deputy Centre Manager. In total, the Centre has six full-time staff (excluding the Managers) and five part-time staff, who have a variety of roles and specialist responsibilities. Between them they deal with enquiries from the public and special customers, provide detailed information on a range of topics, and maintain communication with the Council's local officials in the area, local companies and other Council customers. All of the staff have had many years' experience in working with the Council in other capacities and in other departments, but they have only been working together as a team in this Neighbourhood Centre for less than a year. The roles of the staff are varied and their job descriptions are only very general, as this is a new venture. All staff could be expected to cover everything from general clerical and administrative duties to dealing with clients in face-to-face situations and providing advice on a range of the Council's services. The Neighbourhood Centres are designed to be very client-focused.

Jackie Fallon, New Deputy Manager at High Green Neighbourhood Centre

28 year-old Jackie Fallon has recently taken up the post of Deputy Manager at High Green Neighbourhood Centre. Jackie has been working for 18 months with Midshires County Council at the Town Hall of one of the old Councils, on their Management Trainee Programme. As part of this programme, Jackie spent a few months gaining some work experience within each of the major operational sections within the Council: Housing, Environmental Services, Parks and Gardens, Transport, Education, and Business Development. However, as yet she has had little practical experience of line management. She has had some management training, which has given her some basic management theory and techniques, and she has spent some time shadowing a more experienced manager. She does not have a mentor.

Jackie has now been given her first real management role and responsibility as the Deputy Manager in one of the Council's new flagship Neighbourhood Centres at High Green, on the edge of the City. She will be working for a more experienced manager. Between them, they will share the responsibility for the management of the staff and for the interface with local officials, companies and other council customers. Jackie believes that this very important new role will help to provide the kick-start to the career that she wants within the Council.

Four weeks after Jackie starts her new job, the existing Centre Manager is promoted, and the Area Manager asks Jackie to take on the role of Acting Centre Manager until a replacement for the outgoing Centre Manager is found, and provision can be made for a new Deputy Centre Manager. Jackie agrees to take over responsibility for managing the Centre until a replacement can be found, thinking that it will be good experience for her and will aid her own promotion prospects.

However, although Jackie is keen and wishes to progress, she isn't sure if she can cope on her own. She does not like to voice her concerns, in case this gives the impression of weakness. Before leaving, Jackie's manager gives her a list of fairly routine tasks that she must do in order to keep the Centre running smoothly, and briefs her on some of the likely problems that she might encounter. Jackie is optimistic that if she does the job well, then she might be considered for the post herself.

Jackie's first few weeks as Acting Centre Manager

During her first week in charge, Jackie spends most of her time moving around the different sections and areas in the Centre making sure, in her words, that 'the staff are doing their jobs properly'. She spends some time sitting with each member of the team at their desk or workstation, observing what they doing, how they are doing it, offering them some advice and coaching them on how things might have been improved.

A couple of weeks into her new role Jackie soon realises that she's getting behind with the all of the paperwork that she has to complete and send to the Council's central office. There have been a number of problems to deal with where it has been unclear whose responsibility particular tasks fall to. She has to prepare some initial reports to senior management. Performance statistics need to be compiled. The outgoing manager did not write the staff appraisal interview schedules before leaving, and time is running out if they are all to be completed by the target dates set by the Council. Importantly, Jackie's new role requires her to provide clear team objectives for her staff for the next six months. In particular, Jackie has to speak to the Council's Building Services Department about some unfinished building work in one of the Centre's offices and to the Council's IT Department about access to the Council's intranet from the Centre's computers. Looking at the list of the routine tasks left by her previous manager, Jackie is shocked to see that she has covered hardly any of the items on the list! Clearly, she is facing a crisis.

Jackie's solution is to start arriving at the office very early in the morning, and leaving late, in order to try and catch up on things. Even though she is doing this, Jackie finds that she has to take work home with her in the evening to clear the backlog, a situation her partner has complained about. Jackie finds that there is constant pressure on her, and a regular demand on her time from so many different people that she is beginning to feel that she cannot cope. The telephone never seems to stop ringing and Jackie is frustrated that she is not able to deal effectively with some of these calls. Staff are constantly in her office asking her questions. Because Jackie thinks it is important to be accessible to her team when she does manage to get into her office, she has told staff that she has an 'open door policy'. As a result, some of her team are always popping in for a chat. While some of this chat is work-related, often it is not. Jackie has also noticed that staff seem to be taking breaks at different times and that some members of staff are never available when she needs to speak to them.

One month later

Jackie is feeling exhausted and wonders what is going wrong. The outgoing manager never seemed to have all these problems, and told her that she 'shouldn't have any hassle', provided she carried on in the same way.

On top of all her problems in the office, Jackie has to attend her first management meeting. Along with all of the other Neighbourhood Centre Managers, she has to do a presentation to the Area Manager and to her fellow managers on the performance of her Centre so far. She is concerned that all she has is a range of issues and problems and no successes. She is unsure about how her performance will be judged by the Area Manager and feels very uneasy and vulnerable.

Jackie decides to be positive and resolves to sort the problem out. She comes into work early, making a list of all the things that she needs to do. Unfortunately, Jackie quickly realises that she does not know where to start, as all of the jobs and issues that need dealing with now seem to be urgent. Still continuing to be positive, and with delegation in mind, she sends an email to her team that tells them exactly what she wants them to do. When the team have all arrived for work, she goes out to do her usual round of sitting with them, only to find that they reacted negatively to her message. Indeed, some are very hostile and Jackie finds that some cliques have formed. Bickering has broken out between some members of staff and the atmosphere has become tense and fraught. This was not the happy Centre in which Jackie took the role of Deputy Manager a few months previously.

Jackie is very concerned, but does not know how to resolve the problems.

Questions and tasks

When you have read the case study carefully, go through the following questions and tasks. When you have done this, read the case study again. As you go through, add your own comments and, using a highlighter pen, mark the salient points that you will need to focus on when preparing your responses to the questions.

- Question 1** How would you assess Jackie's leadership style? What evidence is there in the case study to support your descriptions? How have management thinkers described these styles?
- Question 2** What actions might Jackie take to improve her time management skills?
- Question 3** How could Jackie improve on her present work-life balance?
- Question 4** List the key factors that seem to be contributing to Jackie's problems as a new Manager in High Green Neighbourhood Centre.
- Question 5** Prepare a self-development plan that might help Jackie deal with the problems that you have identified in Question 4.
- Question 6** Clearly, Jackie has discovered that there are problems in the working relations and behaviours of members of her team, and that some of these are even spilling over into her own interactions with staff. What can Jackie do in order to create and manage more effective working relations with her team and line managers?
- Question 7** If you were to try to prepare a general self-development plan for members of Jackie's team, what items would you include and why would you include them?
- Question 8** There appears to be a range of perceptions about the appropriate standards of work and behaviour in High Green Neighbourhood Centre. What standards of work and behaviour would you set out for Jackie's staff and how would you communicate them? What actions would you take to try to ensure that they were followed?

Comments and reflections

You will find below some comments and reflections on your possible responses to the questions and tasks relating to this case study. These are designed to help you in your thinking about the situations described in the case study and to indicate ways in which you could apply your knowledge and understanding of the Unit to those situations. Once you have attempted the questions and tasks and checked your responses against the comments and reflections below, you will be in a good position to tackle the assessment for Unit C31.

Question 1

You will probably have recognised situations in your own workplace similar to those described in this case study, and may even have found yourself in a comparable position to Jackie's. Jackie has been thrust into a leadership role without much preparation, but it is evident that she is taking an approach to leading her team. You may have detected elements of her leadership style that appear to be authoritarian in her initial approach to staff. Equally, you may feel that she has been too laid-back or laissez-faire. From your reading and study on this module you may begin to realise the importance of developing a consistent approach to leading your team. It may be that in your response to this question you were not able to delineate clearly a definite style of leadership that you could attribute to Jackie. This may be the source of some of her difficulties.

Question 2

You will no doubt have recognised some of the pressures that Jackie is under and the often conflicting demands on her time. Unfortunately, this case study highlights all too clearly the consequences of poor time management.

Your response to Jackie's situation will have triggered a number of different reactions. At first, you may have thought that she had an impossible task and that no matter what she did, she was bound to fail. However, from your exploration of time management issues and study on this module, it should also be equally clear to you that there are things that busy, stretched and pressurised managers can do to help themselves cope with the kinds of situations that people like Jackie find themselves in. Indeed, if you are going to progress and develop in your management role, it is essential that you avoid the consequences of poor time management by taking a proactive approach to managing your own time.

You may have highlighted the following as possibilities for Jackie to pursue:

- Jackie could have another look at her job description to clarify exactly what is expected of her.
- Prioritisation of tasks also seems to be needed here.
- You might have considered how some of the tasks that Jackie does could be delegated to another member of staff.
- You might see how by dividing work up into different categories Jackie could cope more easily with the demands of her work. You might have identified four major categories, for example: Urgent and Important; Important but not Urgent; Urgent but not Important; and Neither Urgent nor Important.
- Making lists using the headings above could also be of value to Jackie.
- Planning and devising a clear work schedule might also have been highlighted by you as another way in which Jackie could improve her time management.

You will now see clearly how time management effects the way we feel about our work and how it can help to foster good working relations. At least some of Jackie's problems might be reduced if she put some of these actions into practice.

Question 3

You will no doubt have come across the phrase 'work-life balance'. It has become something of a buzzword, often used in relation to overworked, stressed managers. However, it can be applied to all of us who try to juggle our work, family and personal commitments in today's complex society. Briefly, the theory is that we will all be more effective, more active and happier in our work if we maintain some equilibrium between work and non-work. Getting this balance right is not easy, but it is important, and you will have seen signs in the case study that Jackie has not managed to achieve any thing like a satisfactory balance here. You might have considered some of the ways in which you yourself have tried to achieve this, and then applied your thoughts to Jackie's situation. Above all, talking with family, friends and colleagues will be important. Jackie is unlikely to develop herself in a management role if she is unable to establish some kind of work-life balance.

Question 4

You will probably have noted quite a number of different factors that are contributing to Jackie's problems. It is important for you to try to break them down and to analyse each in turn. Taking this approach will help you to resolve some of the difficulties that, as a manager, you will often find yourself in. Your list might have included the following:

- lack of training and support
- lack of clarity on working practices
- a potentially poorly-designed job specification
- no clear guidelines on personal conduct
- an insufficiently worked out set of team objectives
- communication problems at a variety of levels
- poor interpersonal relations
- lack of any consistent management style.

There are others. However, the important thing is to consider what the individual can and cannot do about these factors. One important aspect of this is to try to identify, in as open and honest a fashion as possible, what skills and understandings you as a manager, and your team as a whole, need to develop.

Question 5

A key area that you will have studied on Unit 31 surrounds the concept of Personal Development, sometimes referred to as Personal and Professional Development, or Continuing Professional Development (CPD). Whichever of these terms is used, the essential ingredient is that individuals take some responsibility for assessing and evaluating their own professional and managerial development needs, and identify activities and mechanisms for achieving this in some form of personal development plan. To be fully effective, it is important that we regularly and formally review where we are, and what we might need to learn to be more effective.

Clearly, Jackie is motivated to do well and wants to progress in her career, but she is not making the best of her skills and certainly needs to develop some new ones. Other people working for Midshires may be actively engaged in personal development and could easily overtake Jackie when it comes to an interview. In some situations, individuals may become of limited value to the organisation because they have failed to keep up.

You may have used ASK and ABE as schemes to help Jackie here. Your Personal Development Plan may have made use of the standard areas such as: Areas for attention, Objectives, Activity, Resources needed, Completion date.

Question 6

Your response to this question will have links to your response to Question 1, in that Jackie's management and leadership style will have an impact on the way in which she communicates with her team. There are, of course, a number of models of management style that we could use to try to describe Jackie's approach. The traditional autocratic/democratic model of management would suggest that, the further towards the autocratic that you describe Jackie's style, the less likelihood there is for a two-way dialogue with her team. A more democratic and consensual style will, by necessity, involve Jackie in spending more time in discussions with her team. Arguably, a combination of the two approaches is best, but regardless of that, provided the topic of conversation is focused on the elements of performance standards and behaviours, this will enable Jackie to develop the standards required for her team and gain their commitment, achieving this through their involvement in the process. It will be in Jackie's interest to set out clearly for her team her preferred way of working, although some of this is prescribed from the point of set-up in these new Neighbourhood Centres. A customer-focused approach, where all members of the team multi-function, supports a way of working that is truly team-based.

Question 7

The need to have a highly skilled and multi-functioning team means that the members of Jackie's team have to have a comprehensive set of skills and a good working knowledge of each other's work.

The traditional method involves determining the knowledge, skills and attitudes that are necessary to undertake the job. Further to this, a set of competences could be developed, much along the line of the Management and Leadership National Occupational Standards.

With these two, it is then possible to identify the learning gap – i.e., the difference between what is needed and what the team have.

You may have suggested that some of the following be included in the self-development plan:

- personal details
- job title
- key results areas
- objectives – both personal and work-related
- behaviours and competences in support of objectives – these could be drawn from the Management Standards
- results of training needs analysis.

Of course, the list is not exhaustive. You may have read more into the situation facing Jackie and her team, or you may have more experience of this type of issue.

Question 8

You will no doubt have determined that a key part of Jackie's role as manager of the Neighbourhood Centre is that she takes responsibility for setting out the standards of behaviour, and that this needs to be done clearly and everyone should have access to the specified standards.

The self-development plan that we introduced at Question 7 would make a good start. Some of features of this will be determined by Midshires Council but the key element for Jackie is involving all of her team in developing self-development plans that are personal to individual members, as this will work towards gaining their commitment.

Jackie has already engaged in a regular programme of coaching and this will provide her with the opportunity to observe her team first-hand and to make an assessment as how well they are delivering to the required standards of behaviour. She should be able to see how her team interact with customers and also with each other.

Where to go from here

This case study has taken you into the area of personal development planning and the importance of taking a reflective stance to identifying your own needs. You might be in an organisation that runs its own Continuing Professional Development plan or Personal and Professional Development plan mechanisms. If you have not already accessed these, then now is the time to try to use some of these tools. Remember also that, if there is a formal appraisal system in operation in your organisation, then many of your needs will also be discussed there. If you do not have access to these channels or techniques you may wish to access the CMI website for help and guidance, or to use one of the various training needs analysis tools. These usually involve you in completing a self-assessment questionnaire, with a view to identifying what you can do, what you are good at and what you need to work on.

A good way to try to develop your time management skills is to read some of the recent self-help books in this area. You could begin with:

Bird, P. (2002) *Successful Time Management in a Week*, 3rd ed., Hodder and Stoughton.

Conclusion

After reading this Case Study, answering the questions and undertaking some of the follow-up activities you should be able to demonstrate your knowledge and understanding of:

1. Assess your leadership style, and preparing and managing your self-development plan.
2. Plan and manage your own time.
3. Create and manage working relationships with line managers, colleagues and team members.
4. Inform people of expected standards of work and behaviour.