Integrated Management

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Progressive organizations recognize that it is not the business that competes but rather the managing team. They are aware that most managers fail for administrative, rather than technical incompetency. The good news is that the mastery of management can be learned and this is what this paper addresses. A growing, progressive organization experiences an evolution through several managing phases. The work effort of a manager can be generalized into two categories:

Managing People (obtaining results from employees)
Technical Work (obtaining results from hardware)

The Integration Gap is defined as the difference between the actual and ideal distribution of the above categories of a manager's work effort. The primary "managing people" responsibilities are:

PLANNING
ORGANIZING
LEADING
CONTROLLING

An explanation of each function reveals a practical approach for closing the Integration Gap. The mastery of these functions determines the success of the Professional Manager.

INTRODUCTION

The following topics are key concerns of the professional manager:

Change (Generating New Ideas). It is said that our technical knowledge doubles every five years. Formal education is soon outmoded by new knowledge. It is therefore most important that managers never stop the learning process. Managing skills, however, have lagged the technical skills for most managers. Records indicate that the average managers are retrained technically nine times through their career. Most managers never receive any training for the managing skills that are required in their positions. Managerial obsolescence is, therefore, a genuine threat.

Competition (Struggle for Survival). In an average year, three hundred fifty United States corporations go bankrupt. The latest aeronautical examples are Douglas Aircraft and Braniff International. Business success depends upon management finesse. Bossing and managing represent the two extreme management styles. The type of management system that is practiced is a most important decision for a company. A growing progressive company experiences an evolution of management systems. The following identifies three distinct evolutionary stages:

1st Stage: Patterns of Natural Boss - These managers make most of the technical decisions and do much of their employees' work. They tend to organize around personalities and there is little development of people. Their communication is one-way and their decision-making is often spontaneous and emotional.

2nd Stage: Symptoms of Transitional Leader - In this stage the decision-making becomes cumbersome and cost reduction programs are common as expenses are increasing and managers are usually bought rather than developed. Communications is on a one-to-one basis and in this environment the professional manager often gets penalized.
3rd Stage: Characteristics of Professional Manager - These managers promote group rather than personal interest and all thrust is on a profit-making emphasis through team work, critiques, problem diagnosis and total openness. All energy is mobilized around real purpose and communication takes place with understanding and acceptance.

Commitment (To Give One's Trust). Employee morale is merely symptomatic of management's performance. Gamesmanship and politics are ineffective approaches. The solution is a leadership role, which must be defined and then practiced. Employees need more coaching and counseling. Every company is looking for managers who can communicate. Critique and feedback are basic tools for a good manager. Understanding, acceptance and following of directives is paramount for managers.

Creativity (Degree One Can Think of Different Approaches). People can actually wear out from under-utilization. A systematic approach to thinking and dealing with people is required. Most companies need more managing work accomplishment by managers. It is the consensus that a participative management style is the most effective to attain creativity among employees.

INTEGRATION GAP

The work effort of a manager can be generalized into two categories:

Managing People (obtaining results from employees)

Technical Work (obtaining results from material)

The "Integration Gap" is pictorialized on the Figure 1.

It reflects the difference between the actual and ideal distribution of work effort. This difference is a revelation to most managers. A delegation of technical detail is required before a manager can exert more effort toward managing people. The primary "managing people" responsibilities and their associated tasks are as follows:

PLANNING - Where are we going?
  Predetermining - Forecasting - Programming - Scheduling

ORGANIZING - Who is going to do the work?
  Structuring - Delegating - Relating - Placing

LEADING - How will we get proper response?
  Communicating - Motivating - Deciding - Enriching

CONTROLLING - Where do we stand against the plan?
  Budgeting - Measuring - Evaluating - Correcting

Corresponding with each managing responsibility are the associated tasks listed above. The following discussion is an explanation of these four responsibilities which are to be utilized in closing the integration gap. The timespan to master the "managing people" skills and the timespan to build a strong team to take the detailed technical load is considered to be five years. During the transition, the appropriate balance must be maintained. During the transition, it is best to place emphasis on technical results, but it is also necessary to pursue the delegation of technical work relentlessly. The mastery of true professional manager competence is well worth the effort.

PLANNING RESPONSIBILITY

Planning is the basis for successful managing action because we take time to reflect, analyze, consider alternatives, and arrange our thoughts in proper order. In planning, the manager anticipates future opportunities, challenges, obstacles, and controls. The characteristics of planning are:

- Make decisions before action is implemented.
- Determine future demands on people, including establishing accountability.
- Requires generation of change.
- The scheduling of time.

The general managing tasks supporting planning are:

Predetermining (Establishing the Results to be Accomplished). This task involves the development of three specific parameters that measures the end results:
  - Objective - ties all plans together and is a functional statement that defines clearly the purpose, nature and reason an organization exists. It is the introductory paragraph to the function and responsibility detail.
  - Goal - Meets certain important criteria, such as being specific, measurable, challenging, consistent, and time-limited. After the key organizational objective has been formulated then the manager identifies significant performance areas. Goals
INTEGRATION GAP

Figure 1
are reserved for those items needing improvement.

Standard - Sets the limits for routine work performance. The manager formulates standards from a logical analysis versus one's own consciousness. Work standards are based on good plans, schedules, and budget allocations. Every task should have a work standard. Many organizations will also add upper and lower alert values. Management by exception can then be placed into practice.

Forecasting (Statement Estimating Future Conditions, Possibilities, and Events). There are three dimensions of forecasting:

- Time - How far ahead?
- Direction - What are the Cyclical and Linear Trends?
- Mitude - Is there a Standard Base to Measure Movements?

Sure for forecasting are twofold:

- Mechanical projections
- Analytical projections

It is the latter that is stressed because it makes use of logical analysis. This approach does require access to reliable data such as budgets and procurements.

Programming (Establish Sequence of Action Steps). This task states what events will be accomplished. If systematic programming is ignored, only what "seems" important at the time gets done. Programming involves five basic steps:

1. Review the goals
2. Determine the major steps
3. Establish priorities
4. Determine the detail
5. Review, reconcile and integrate.

Scheduling (Establish the Time Sequence for Program Action Steps). Managers should recognize the distinction between the forecast, program and schedule. There are four time considerations in scheduling:

- Applying the PERT technique.
- Recognize trade-off concepts.
- Applying the doctrine of the critical few - This doctrine states that the first twenty percent of the time is the most critical period as it will develop eighty percent of the problems.

Applying Program Criteria to the final 20% to determine the conclusion of a program.

The line of balance technology relates the forecasting, programming and scheduling tasks. It is an example of planning technology.

ORGANIZING RESPONSIBILITY

A sound organization is an important key to the success of managers. Organizing has several meanings, but our concern is what the manager means by organizing:

When a manager plans - determines the future course of events.

When a manager leads - gets other people to carry out the plans.

When a manager controls - checks to see that the work is done.

When a manager organizes - makes arrangements so people can work effectively.

Therefore, a manager must know when people are doing their best work, that people have full and satisfying jobs, that people have authority to make routine decisions, and that people are working together as a team. All this calls for special managing work which we define as organizing. There are several misconceptions concerning this responsibility, such as: chart-making is the first step; determining objectives and goals is the last step; that management is two directional, up and down; and that organizing is a four step process. The general managing tasks supporting organizing are:

Structuring (Identify and Group the Work). An organization can be compared to a fruit tree or tomato plant in that excesses must occasionally be pruned to bear good fruit. The purpose of a proper structure is to get the most work done with the fewest people at the least cost with the greatest satisfaction. Six doctrines that need to be recognized in the structuring process are:

- Specialization - Increases potential for efficient performance.
- Logical Arrangement - Greatest accomplishment with the highest satisfaction.
- Maximum Span - The greater the span of functions the less people required.
- Minimum Levels - The fewer the levels the greater the effectiveness.
Homogeneous Grouping - Potential increases with consistency.

Carryover - Early organization characteristics tend to persist in later forms.

Every manager should keep an active ideal organization in being. Whenever a change takes place, it is an opportunity to move one step closer toward the ideal structure.

Delegating (Entrust Responsibility and Authority to Others and Create Accountability for Results). There are three elements to consider for improving delegation:

Responsibility - The assigned continued delegation is to a position, not a person. Eliminates the personal work preference.

Authority - Relates to work accomplishment and is the sum of the powers and rights of a position.

Accountability - Obligation to perform work and make decisions.

There are two basic questions:

What to delegate? The answer is all operating work detail which is the technical specialization.

What not to delegate? The final managing decisions (all 16 tasks that are discussed in this paper), decisions on overall technical problems, and work that employees cannot perform.

Relating (Create Conditions for Cooperative Efforts of Others). This task separates the line and staff relationships to eliminate duplication from assignments. It recognizes that staff offers aid and service and that line makes the final decisions. The effort distribution for staff by organization level is reflected in Figure 2.

A manager's effectiveness is also enhanced if viewed and understood to be four-directional. Figure 3 portrays this concept.

Experience indicates that the number one and three directions usually need strengthening. The ten commandments of good organization developed by the National Management Association is a good criteria to follow for the professional manager.

Placing (Choosing People for Positions). The manager has the responsibility and authority and therefore is accountable for selections and promotions. Managers must give attention to these important factors:

Find the best talent available.

Careful screening against highest standards.

Willingness to recommend the best people for promotion.

The latter factor indicates that a responsibility is to help people improve their knowledge, attitude and skills. Three tools that should be utilized are the performance appraisal, potential appraisal and performance counseling. The purpose of development is to upgrade:

Knowledge - Employee doesn't know
Skill - Employee can't do
Attitude - Employee doesn't care

Every employee should be guided to establish a self-developmental plan.

LEADING RESPONSIBILITY

In the final analysis a manager's effectiveness depends on the success in getting the people to use their creative abilities. This work is identified as a responsibility of leading. With sound leadership, a good manager accomplishes much, even if lacking plans, organization and controls. However, when equipped with all four management tools (leadership, plans, organization and controls), good managers become outstanding. The thinking of leadership as the exercise of power is totally outmoded. Leadership depends on followership - getting people to work because they want to, not have to. The true measure of a manager's performance is how they direct and guide people in using their best abilities to attain established goals. The following general managing tasks support the leading responsibility:

Communicating (to Create Understanding and Acceptance). Communicating is a four-way process:

Asking - Applies to all levels.
Telling - Entails forward directional transmission.
Listening - Best guaranty for understanding.
Understanding - Should be heard by head and heart.

To be understood we must transmit in all four directions discussed under Relating.

There are two documents used for formal communication:

First is policy - (a standing decision applying to repetitive questions regarding significant situations.) Provides for ethical and equitable treatment of employees;
STAFF FUNCTIONS

Figure 2
MANAGER RELATIONSHIP

ANTICIPATES FUTURE COURSE OF ACTION
(2)
LEADER

SELF
(1)
TIME & EFFORT

CRITIQUE RESULTS (4) PEERS

PEERS (4) COORDINATE ACTIONS

EMPLOYEES
(3)
MANAGE AND CONTROL ASSIGNMENTS

Figure 3
has the advantage that the consideration is thought out beforehand, therefore, eliminating hasty crises decisions; aids delegation to managers for repetitive conditions; and encourages effective teamwork; and provides management consistency in decision-making.

Second is procedures - (a standardized method for performing standardized work) Specifies the way in which particular work is to be performed; breaks projects down into basic steps; and is an authorization for all accountable managers. Repeatability is the key characteristic of procedures.

Motivating (to Inspire and Compel People to Take Required Action). The key issue in motivating people is to recognize their needs. There are two basic categories. One is termed "satisfiers", which are sponsored by the union and the company, and which merely satisfies the physical and security needs. The other are the "motivators", which are sponsored by managers only. This recognizes the need for attention and approval, the desire to excel, pride, belonging, and self-actualization. Managers must differentiate the satisfiers and motivators to make progress in this task. Before a manager can recognize the needs of the people it is important that the manager recognizes his own characteristics and style of management. One method of identifying the managerial style is to use the managerial grid. Five management styles are defined:

- Status quo - Minimum effort, sustains members
- Paternal - Friendly, comfortable tempo, minimum effort
- Competitive - Good production, strained relationships
- Supportive - Average performance, satisfactory morale
- Participative - Committed, creative, trusted employees

The company's leadership style can also be determined on this grid. It is the latter style that receives high productivity. If a person is not motivated, they usually show symptoms of frustration. Frustration is indicated in two forms: either through aggressiveness, or resignation. How does a manager motivate? Try by increasing recognition, appreciation, contribution, challenge, and participation.

Deciding (to Arrive at Conclusions and Judgments). There are two basic types of decisions: spontaneous and reasoned. The latter determines the logical analysis of a problem and is based on systematic study. It is this approach that a manager should follow whenever possible. Following the logical problem solving process won't guarantee, but will certainly improve the probabilities. The steps are:

1. Identify the problem.
2. Gather the pertinent data.
3. Validate and analyze data.
4. Test the alternatives.
5. Make the decision.

Decisiveness is a key point in this major managing task.

Enriching (Develop Good Feelings Towards the Work). There are many suggestions for attaining job enrichment such as, coaching, job rotation, seminars, and committee participation. One recent concept is to introduce the skills for problem analysis and solving by exploiting the "employee circle" approach. The employee circle technique incorporates the problem solving cycle, potential problem yardsticks, problem analysis, and the problem solution. It has met with much success when seriously sponsored and is supported by the manager.

CONTROLLING RESPONSIBILITY

A plan sets forth a course of action which is important, but the ability to stay on the pre-determined course is equally vital. This responsibility of a manager to stay on course is termed "controlling". It assesses and regulates the work in progress as well as the results attained. Control of results is least effective. Control of work in progress is diagnosis and treatment. Regulating work in progress is the ultimate control action. There are three controlling approaches:

1. Corrects the variances before they occur through anticipation.
2. Develops reports and control techniques to identify errors.
3. Standards are set collectively with the people.

A first-line manager secures most of the direct results, spends most of the money, manages most of the people, and witnesses most of the action. Therefore, the greatest potential for control exists at the first level. To fulfill this responsibility, information about the work must be provided. The following general managing tasks support controlling:
Budgeting (Allocate the Necessary Resource to Attain Goals). Budgets are used in three ways:

Planning tool for developing goals.

Enables economical use of the resources.

Provides a standard for managerial performance.

There are several key issues in developing budgets. The first is budget from the top down, then bottom up; base budgets on programs, not historical costs; establish management accountability; and maintain integrity of budgets by analyzing:

Underrunning - Should indicate need for inquiry.

Overrunning - Suggests need for investigative action.

It is well to differentiate controllable versus overhead expenses. The latter should always be included to show the total cost impact.

Measuring (Report Work Being Done and Results Attained). The following are key issues in measuring:

Basic responsibility of every manager.

Must always compare actuals to standard, budget, or goal.

Adopt a stewardship concept.

Report promptly for preventive action.

The Productivity Enhancement Program is an evaluation or measurement of employee activity. It considers three factors:

Out-of-area, nonproductive time, and the work effort of the employees. It involves three functions, namely, measuring productivity, analyzing the reason, and determining what is required to improve the productivity. The productivity index is an indicator for balancing the skillpower between shops, evaluating the need for overtime and establishing standards for the work tasks.

Evaluating (Appraise Work In Progress and Results Secured). A manager's work is not complete until they analyze and interpret end results. Otherwise, measurement is futile. This task requires a comparison of actual results with the standard. There are two basic types of deficiencies: variance, which falls within allowable limits of tolerance and can be corrected by the accountable manager, and the exception, which falls outside of allowable limits and should be reported to higher organization levels. The manager is always held accountable.

Correcting (Improve the Work Being Done and Results Secured). Control is effective only to the extent that it motivates managers to take prompt, decisive steps to correct matters at hand. There are two types of performance corrections: technical action, and managing action. The latter is required for effective technical action and requires a basic analysis of causes and determines the need for improving the planning, organizing, leading, and controlling. Every deficiency should prompt a check to ensure the adequacy of a management function. In this way the controlling responsibility maintains a continuing spiral of improved performance. This is the final test of a professional manager.

ACKNOWLEDGEMENT

The general managing responsibilities and the corresponding general managing tasks that are addressed in this paper are arranged and reflected on the attached "Integrated Management" illustration. The responsibilities and tasks as noted in the diagram were carefully selected from the works of many leading writers and teachers. There are semantic differences in the use of the terms. This paper correlates and organizes these various functions as perceived by this author. The unique technical responsibilities are likewise indicated at the perimeter of the chart. Each of these responsibilities could also be broken down into unique operating tasks. The thrust of this paper, however, is to emphasize the managing people responsibilities of the manager.

INTEGRATED MANAGEMENT