PART ONE: DEFINING SUPERVISION AND SUPERVISORY CHALLENGES

Chapters 1–2

Part 1 introduces the world of work and the functions of a supervisor. Emphasis in this section is placed on supervisory roles and the skills needed to be successful in today’s ever-changing work environment. Supervisory positions are also being influenced by a number of environmental factors. What these factors are, and how they affect the supervisory function, are discussed.

* Chapter 1 Supervision Fundamentals
* Chapter 2 Supervision Challenges

CHAPTER 1

Supervision fundamentals

**CHAPTER OUTCOMES AND LEARNING OBJECTIVES**

Objective 1-1. Explain the difference among supervisors, middle managers, and top management.

Objective 1-2. Define *supervisor.*

Objective 1-3. Identify the four functions in the management process.

Objective 1-4. Explain why the supervisor’s role is considered ambiguous.

Objective 1-5. Describe the four essential supervisory competencies.

Objective 1-6. Identify the elements that are necessary to be successful as a supervisor.

Objective 1-7. Identify the value of studying supervision.

ORGANIZATIONS AND THEIR LEVELS

What Common Characteristics Do All Organizations Have?

What Are the Organizational Levels?

THE MANAGEMENT PROCESS

What Is Management?

What Are the Four Management Functions?

Do Management Functions Differ by Organizational Levels?

CHANGING EXPECTATIONS OF SUPERVISORS

What Roles Do Supervisors Play?

Are Supervisors More Important in Today’s Organizations?

Is Sustainability Important to a Supervisor?

Does a Supervisor Need to Be a Coach?

TRANSITION FROM EMPLOYEE TO SUPERVISOR

Where Do Supervisors Come From?

Is the Transition to Supervisor Difficult?

Do You Really Want to Be a Supervisor?

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How Do Interpersonal Competencies Help?

What Is Conceptual Competence?

Why Must One Have Political Competence?

How Do Competencies Shift by Managerial Level?

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SOLUTIONS TO REVIEW AND DISCUSSION QUESTIONS

DEVELOPING YOUR SUPERVISORY SKILLS:

* GETTING TO KNOW YOURSELF SELF-ASSESSMENT LIBRARY 3.4 EXERCISES
* BUILDING A TEAM
* MENTORING OTHERS
* COMMUNICATING EFFECTIVELY
* SUGGESTED ANSWERS TO THINKING CRITICALLY CASE STUDIES

Chapter 1

Supervision Fundamentals

Responding to a Supervisory Dilemma: Organizations are changing and the traditional organizational structure is still evident, but some organizations are changing the traditional structure. Google uses a cross-functional organizational structure that is more of a team approach to management and is structured horizontally. Maintaining a small-company feel and providing customizable employee benefit programs are important parts of Google’s success.

ORGANIZATIONS AND THEIR LEVELS

**OBJECTIVE 1-1. Explain the difference among supervisors, middle managers, and top management.**

OBJECTIVE 1-2. Define supervisor.

Organization: A systematic grouping of people brought together to accomplish some specific purpose.

* Examples

—Your college or university

—Sororities and fraternities

—Charities

—Retailers and wholesalers

—Sports teams

What Common Characteristics Do All Organizations Have?

* Purpose

—Typically expressed in terms of a goal or goals

* People

—It takes people to establish the purpose and to make the goal a reality

* Systematic structure

—Defines roles of members, and sets limits on their work behavior

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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What Are the Organizational Levels?

See: Exhibit 1-1: Levels in the traditional organizational pyramid.

* Top management

—A group of people responsible for establishing an organization’s overall objectives and developing the policies to achieve those objectives

* Middle managers

—All employees below the top-management level who manage other managers; responsible for establishing and meeting specific departmental or unit goals set by top management

* Supervisors

—Part of an organization’s management team; supervisors oversee the work of operative employees and are the only managers who don’t manage other managers

—May also be referred to as first-level managers

* Operative employees

—Employees who physically produce an organization’s goods and services by working on specific tasks

* Supervisor defined by Taft-Hartley Act (Labor-Management Relations Act, 1947)

—Specifically excluded supervisors from the definition of employee

—A supervisor is any person who can “…hire, suspend, transfer, lay off, recall, promote, discharge, assign, reward, or discipline other employees while using independent judgment”

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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THE MANAGEMENT PROCESS

OBJECTIVE 1-3. Identify the four functions in the management process.

What Is Management?

The term *management* refers to the process of getting things done, effectively and efficiently, through and with other people. Several terms of this definition warrant some discussion: process, efficiently, and effectively.

See: Exhibit 1-2: Efficiency versus effectiveness.

* Management

—The process of getting things done, effectively and efficiently, through and with other people

* Process

—The primary activities supervisors perform

* Efficiency

—Doing a task right; also refers to the relationship between inputs and outputs

* Effectiveness

—Doing the right task; goal attainment

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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What Are the Four Management Functions?

See: Exhibit 1-3: Management functions.

* Planning

—Defining organizational goals, establishing an overall strategy for achieving these goals, and developing a comprehensive hierarchy of plans to integrate and coordinate activities

* Organizing

—Arranging and grouping jobs, allocating resources, and assigning work so that activities can be accomplished as planned; determining which tasks are to be done, who is to do them, how the tasks are to be grouped, who reports to whom, and when decisions are to be made

* Leading

—Motivating employees, directing the activities of others, selecting the most effective communication channel, and resolving conflicts among members

* Controlling

—Monitoring an organization’s performance and comparing performance with previously set goals; if significant deviations exist, it’s getting the organization back on track

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Do Management Functions Differ by Organizational Levels?

A manager’s level in an organization affects how these management functions are performed.

* Top management

—Focuses on long-term, strategic planning and structuring the overall organization

* Supervisors

—Focus is on short-term, tactical planning and structuring jobs of individuals and work groups

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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CHANGING EXPECTATIONS OF SUPERVISORS

OBJECTIVE 1-4. Explain why the supervisor’s role is considered ambiguous.

* Then (70 or so years ago)

—Supervise closely, discipline when the rules are broken, admonish employees to “Shape up or ship out!”

* Now (contemporary organizational view)

—Trainer, advisor, mentor, facilitator, and coach

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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What Roles Do Supervisors Play?

The supervisor’s job is unique in that it bridges the management ranks with the operating employees. No one else in the organization can make that claim. Yet because of this uniqueness, supervisors have an ambiguous role. Each of the following offers a different viewpoint of the supervisor’s role:

* Key person

—The critical communication link in the organization’s chain of authority

* Person in the middle

—The reconciler (buffer) between the opposing forces and competing expectations of higher management and workers

* Just another worker

—Because they perform tasks alongside the same people they manage, supervisors are often thought of as no more than operatives themselves

* Behavioral specialist

—Supervisors need strong interpersonal skills

—Must be able to understand the varied needs of their staff and be able to listen, motivate, and lead

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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{REFER STUDENTS TO COMPREHENSION CHECK 1-1.}

Are Supervisors More Important in Today’s Organizations?

Regardless of what people think and the different role perceptions they hold, a case can be built that the supervisor’s job will continue to become increasingly important and complex in the future.

* As change agents

—To cut costs and increase productivity

—Continuous quality improvement

—Introduction of work teams

—Flexible work hours

—Accident-prevention and stress-reduction programs

* Fewer middle managers

—Will significantly expand responsibilities for supervisors

—“Lean and mean” continues to be a major theme for the best corporations

—Organizations are particularly thinning their ranks among middle management and staff-support personnel

* As trainers

—Training becoming more important than ever before as organizations seek to improve productivity

—Many new employees are poorly prepared for work, or have language or communication deficiencies

—Technology requiring additional skill training among current employees

—Supervisor will carry the primary burden for identifying these skill deficiencies, designing appropriate training programs, and even providing the training

* As mechanisms for employee engagement
* Employee engagement has been found to be the single most important variable in employee productivity and loyalty; it isn’t pay or benefits or workplace environment
* When employees are connected to, satisfied with, and enthusiastic about their jobs—accounting for at least 70 percent of an employee’s level of engagement
* When companies increase their number of talented managers and double the rate of engaged employees, their earnings per share is 147 percent higher than competitors

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Is Sustainability Important to a Supervisor?

Organizations recognize the need to add products that will meet the challenges of a changing world, and contemporary corporate action affirms that sustainability and green management have become mainstream issues for supervisors.

* Sustainability

Sustainability has been defined as:

—A company’s ability to achieve its business goals

—Increase long-term shareholder value by integrating economic, environmental, and social opportunities into its business strategies.

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Does a Supervisor Need to Be a Coach?

* The boss

—Traditional “authority figure” to keep employees in line

—Decide

—Direct

—Order

—Control

* The coach

—They must develop their employees, clarify responsibilities and goals, motivate employees to higher levels of performance, and represent their workgroup’s interests within the organization

—Listen

—Guide

—Train

—Assist

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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TRANSITION FROM EMPLOYEE TO SUPERVISOR

• What does it mean to become a supervisor?

—Major turning point in career

—Responsible for own work and the work of others

—Time when authority is given to someone—and that authority can be used in a variety of ways

—Time of added responsibility and accountability to the organization (become part of a management team)

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Where Do Supervisors Come From?

* Within the ranks of their current employers

—Source of many new supervisors

—Employees know how the operations function

—Understand how things are done in the organization

—Abilities are known to management

—Acts as an employee motivator

* New college graduates

—Both two- and four-year colleges

—With additional organizational training, can readily step into first-line management

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Is the Transition to Supervisor Difficult?

* Initial view of manager as “boss” incorrect

—Still have to work—a lot!

—Now you’re a troubleshooter, juggler, and quick-change artist

—Problem-solver, decision-maker, and resource allocator

* Unprepared for the demands and ambiguities

—Unrelenting workload/pace

—Simultaneous problems with constant interruptions

* **Technical expertise no longer primary determinant of success or failure**

—Now you have to get things done through others

—Technical “know-how” not enough anymore

—Now you have to motivate others to high performance

* **Supervisor’s job comes with administrative duties**

—Paperwork and exchange of information were time consuming

* **Weren’t prepared for the “people challenges”**

—Managing people is the most demanding skill of all

—Dealing with personal problems, counseling, and providing leadership

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Do You Really Want to Be a Supervisor?

* Factors to consider

—Longer work hours, including the possibility of having to come in on “off” days

—Seemingly endless piles of paperwork to complete

—May actually reduce your pay; i.e., you don’t get paid overtime pay now

—Still a rewarding and exciting career

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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SUPERVISOR COMPETENCIES

**OBJECTIVE 1-5. Describe the four essential supervisory competencies.**

Professor Robert Katz and others found that successful supervisors must possess four critical competencies: technical, interpersonal, conceptual, and political competencies. These remain relevant today.

See: Exhibit 1-4: How competency demands vary at different levels of management.

Something to Think About (and promote class discussion) Becoming a Supervisor

News Flash! The Supervisor’s Role in Modern Organizations

What Is Technical Competence?

* Specialized knowledge or expertise

—Ability to understand technical aspects of the job

—Ability to understand what each worker does

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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How Do Interpersonal Competencies Help?

* Ability to work well with people

—Understand

—Communicate

—Motivate

—Negotiate

—Delegate

—Resolve conflicts

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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What Is Conceptual Competence?

* Mental ability to analyze and diagnose complex situations

—To see the organization as a complex system of interrelated parts

—To give the supervisor a broad perspective

—To enhance problem-solving and decision-making capabilities

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Why Must One Have Political Competence?

* Political Competence

—The ability to enhance power

—To build a power base

—To establish the “right” connections

—Not all political behavior is negative

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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See: Exhibit 1-4: How competency demands vary at different levels of management.

As Exhibit 1-4 illustrates, (1) technical competence declines in importance as individuals rise in the organization; (2) interpersonal competencies are a constant for success, regardless of level in the organization; and (3) conceptual and political competencies increase in importance as managerial responsibility rises.

How Do Competencies Shift by Managerial Level?

* Technical Competencies

—Have greatest relevance for first-level managers

—Decline in importance as individuals rise in the organization

* Interpersonal Competencies

—Critical at all levels of management

—Particularly critical for supervisors because they spend so much time in leading activities

* Conceptual Competencies

—Increase in importance as managerial responsibility rises

—The higher the position in an organization, the more problems faced that are of a complex, ambiguous, or ill-defined nature, which require custom-made solutions

* Political Competencies

—Increase in importance as managerial responsibility rises

—Middle and top managers concerned with resource allocation; i.e., “fighting” for their piece of the organizational pie

—To develop alliances, support one project over another, or influence situations

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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FROM CONCEPTS TO SKILLS

OBJECTIVE 1-6. Identify the elements that are necessary to be successful as a supervisor.

What Is a Skill?

See: Exhibit 1-5: Key supervisory skills

* Skill

—The ability to demonstrate a system and sequence of behavior that is functionally related to attaining a performance goal

—No single action constitutes a skill

—A system of behavior that can be applied in a wide range of situations

—In aggregate, they (per Exhibit 1-5) form the competency base for effective supervision

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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What Else Is Critical for Me to Know About Supervising?

* You are part of management

—You support the organization and the wishes of your managers

—You are loyal to the organization

—You develop the respect of your employees, as well as your peers and boss

—You continually keep your skills and competencies up-to-date

* You have legitimate power

—You direct the activities of others

—You have authority to act and to expect others to follow your directions

—Instead of the “iron fist,” you must develop interpersonal skills

* You’ll be supervising a diverse workforce

—Be sensitive to their needs

—Recognize their different talents

—Be tolerant and empathetic to them as individuals

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Why Study Supervision?

OBJECTIVE 1-6. Identify the elements that are necessary to be successful as a supervisor.

* Benefits and advantages
* Understanding supervision concepts and how supervisors think will help get better results at work and enhance your career
* Unique position of offering support and guidance
* Successful employees are regularly promoted to supervisory roles
* Can help organizations achieve their goals
* As a supervisor, you can be assured that your efforts, skills, and abilities are needed

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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{REFER STUDENTS TO COMPREHENSION CHECK 1-2.}

COMPREHENSION: REVIEW AND DISCUSSION QUESTIONS

SOLUTIONS TO REVIEW AND DISCUSSION QUESTIONS

* 1. What differentiates supervisory positions from all other levels of management?

Learning Objective: 1-1

AACSB tag: Application of Knowledge

Supervisors oversee the work of operatives. They are the only level of managers who do not manage other managers. Additionally, unlike other managers, supervisors often do many of the same tasks as the operatives they manage.

* 1. Is the owner-manager of a small store with three employees an operative employee, a supervisor, or a top manager? Explain.

Learning Objective: 1-1, 1-2

AACSB tag: Application of Knowledge

Most likely, he or she will be all three. As supervisor, the owner-manager will make sure the day-to-day operations are performed. As middle manager, the administrative duties normally assigned to middle management will be done by the owner-manager. And, because he or she, as owner, has developed, and continues to develop, strategies and objectives as well as policies to achieve those objectives, the owner-manager is also top management.

* 1. What specific tasks are common to all managers, regardless of their level in the organization?

Learning Objective: 1-3

AACSB tag: Application of Knowledge

Planning, organizing, leading, and controlling are the functions all managers must engage in (the management process). The emphasis given to each varies according to the level of management.

* 1. Contrast time spent on management functions by supervisors versus top management.

Learning Objective: 1-1, 1-5

AACSB tag: Application of Knowledge

Planning activities increase as one moves up the management ladder. Top managers are concerned with strategic, long-term planning, while supervisors are more concerned with short-term, tactical planning. Organizing activities increase in importance at higher levels of management, centering on overall organization design, while supervisors are more concerned with individual and work group designs. Leading activities are most important at the supervisory level of management and decrease in importance at higher levels, and controlling activities are most important at higher levels of management.

* 1. “The best rank-and-file employees should be promoted to supervisors.” Do you agree or disagree with this statement? Explain.

Learning Objective: 1-6

AACSB tag: Application of Knowledge

Being a good rank-and-file worker does not mean you’re going to be a good manager. In fact, quite often just the opposite is true. Supervisors are usually chosen from the ranks because of their demonstrated ability to get the job done. But doing the job is not the same as making sure the job gets done. This takes management skills.

Directing other people’s activities and behavior is crucial for supervisory success. Without these skills, rank-and-file workers will have difficulty in managing other people.

1-6. Why is conceptual competence more important for top managers than for first-level supervisors?

Learning Objective: 1-5

AACSB tag: Application of Knowledge

Conceptual skills include the ability to analyze and diagnose complex situations. Top managers are in a position to see the “big picture” and, because they are responsible for strategic planning, their activities are more broadly defined as they affect the entire organization. Supervisors, on the other hand, are in the trenches. They are more concerned with the technical skills needed to help workers get the job done.

1-7. A supervisor is both “a key person” and “just another worker.” Explain this phenomenon.

Learning Objective: 1-4

AACSB tag: Reflective Thinking

Supervisors must play many roles and wear many hats. As part of the management team, the supervisor is in the organization’s formal chain of authority; i.e., the link between upper management and rank-and-file employees. At the same time, supervisors are in the trenches, concerned with the day-to-day activities crucial to the accomplishment of organizational objectives. For this reason, they are often perceived as just another worker.

DEVELOPING YOUR SUPERVISORY SKILLS: GETTING TO KNOW YOURSELF SELF-ASSESSMENT LIBRARY 3.4 EXERCISES

How Motivated Am I to Manage? (III. B. 4.)

**Overview**

As the analysis notes, not everyone is motivated to perform managerial functions. This instrument looks at six components that have been found to be related to managerial success, especially in larger organizations. If you receive a high score, the bureaucracy is for you and a low score; small entrepreneurial firms are more suited to you.

This instrument is interesting in light of the evolution of even larger organizations to working as teams or in a virtual reality. Because of the changing nature of organizations from learning organizations to flat structures, the approach to management is altered to one of coaching rather than directing. Whether one is drawn to being a manager will depend to a large extent on the structure of the organization.

**Teaching Notes**

A relevant issue is the reality that the concept of manager is quite different in a knowledge-based world than it has been in the last 4,000 or so years. Managers are to orchestrate, but the individuals or teams are more self-managing than in any time in human history that we know of. The concept of manager means that one needs knowledge that is special to being a manager. For years, whether you knew about managing or not, the road to promotion and more money was, and for many organizations still is, being a manager. Many people love their specialty and truly hate managing. They may miss their hands-on work that they went to school in the first place to acquire, they may just not be suited personality wise to manage, or they may be afraid because they know nothing about managing and don’t know how to do it. These and a host of other issues have made managing a complex and difficult issue for many managers.

Some companies have solved the problem by creating two tracks: one for managers and one for those who wish to remain in their technical field. Each can be promoted and receive more pay, thus enabling a choice. This system is seemingly better for both the individual and the organization. The individual is more likely to enjoy her or his work and have a stronger commitment to the company, and the organization taps into those who truly want to manage. If they just want to and are not particularly adept, training is available because any new manager needs to keep up with the field and be managed herself or himself.

**Exercises**

1. Discuss what it is to be a manager.

##### Learning objectives:

To illustrate what a job in management actually involves and that management is not for everyone.

##### Preparation/time allotments:

This should be about a 20-minute class discussion.

##### Advantages/disadvantages/problems that might arise:

A younger class may not have much management experience. They also tend to assume that everyone wants to be a manager at some point in their careers. Point out to them that management is a specific career with a separate set of skills required for success. It should not be viewed as a reward for good performance in a technical field.

2. Ask the students if they want to be managers. If no, why not and what are they anticipating in an organization to advance their careers? And if yes, what is their conception of what that will mean to them as individuals and to their careers?

##### Learning objectives:

To illustrate what a management job actually involves, and to explore if that is the type of job they would be interested in.

##### Preparation/time allotments:

This should be about a 15-minute class discussion.

##### Advantages/disadvantages/problems that might arise:

Point out to them that management today is a separate field, and that they still can achieve career goals without actually being a manager. This is especially true given the technical nature of work. This does not mean that they should ignore management principles because most competent workers eventually will have to manage. Tie this in with a discussion of the current state of organizations and work.

**Internet Links**

1. <http://www.eatyourcareer.com>

EatYourCareer.com is a website dedicated to helping people create the nourishing professional experiences they deserve

1. <http://www.providersedge.com/docs/leadership_articles/Age_of_Social_Transformation.pdf>

Peter Drucker has seen much of the evolution of management in the 20th century and has written insightfully about management then and now. Here is a wonderful article, “The Age of Social Transformation.” Please read the article and then be prepared to discuss his points in class as they relate to your career and to the career of a manager.

What’s My Basic Personality? (I. A. 1.)

**Overview**

Personality is a unique set of attributes that every human being has. It is quite often the first thing that we notice about a person when we meet them. We immediately assess and judge them based on the attributes identified in this self-assessment exercise. For example, you are taking an interview for a new job. You have done your homework and researched the company’s history, its corporate earnings, and expected earnings; checked with others who are familiar with the company’s culture and attitudes toward employees; and have researched the trade magazines such as *Fortune*, *Fast Company*,and *Business Week* on how the company is being managed in the 21st century. You have also visited the company’s website and made assumptions as to what type of “personality” would best fit into the company. You realize that this is the company for you and the job for you. Your personality appears to fit right in, and you are hopeful the interviewers will agree. But so as not to leave too much to chance, you rehearse your interview with friends with like personalities so you can show off your own personality to the best advantage. On the day of the interview, you dress the part, act the part, and “hit a home run” in the interview from your perspective. Your personality seemed to mirror that of the panel of interviewers; making you very comfortable and able to “do” a good interview. The next day you receive a call from the company human resources department offering you the job. It appears your assessment, at least on the surface, was correct, and you should be able to do well in this culture.

In this situation, you have used your personality in a positive way to achieve your goal. Had you done your research and found a mismatch between your personality and the company’s culture, you might have either passed up an interview or failed miserably in the interview from both your perspective and the company’s. In *Built to Last*, by Collins and Porras, they discovered that many companies, as part of long-term success, have very strong cultures that in many ways dictate a certain personality type if one is to be successful. For example, if you work at 3M, a high score on *Openness to Experience* would be an almost necessary personality attribute or trait because the culture is built around innovation, change, and creativity. At Nordstrom’s, there is a cult-like culture that demands an adherence to the “Nordy” spirit and culture, so high scores on extraversion and agreeability are essential traits to possess. If you are low on either of these, the Nordstrom culture is probably not the place for you. Knowing your own personality and the culture of the company can save both parties much time, effort, and money if the culture is strong and has fairly specific expectations around behavioral patterns.

##### Teaching Notes

Scotsman Robert Burns in “Ode to a Louse” (that is lice in a woman’s bonnet as seen in church) writes the following lines (they are originally in the English of the times so this is a loose translation): “Would the power God give us to see ourselves as others see us; it would from many a blinder free us and foolish notion.” Understanding the impact of one’s personality on others is part and parcel of this quote and essential to finding a successful match between an organization, a person, and the person’s career choice. It is both economically and psychological cost effective for both the company and the potential employee if, from the beginning, there is some sense of “fit.” The students can use this exercise to see where they are in their personality evolution at this point. That is, although personality is relatively set in many ways, extraordinary events (wars, encouragement in class with the right timing, experiencing something that changes one’s world view) can change a personality.

In many instances, there is not a perceived match between the employee and the culture, but something in the new employee changes enough to adapt to the situation. Again, drawing from *Built to Last*, Merck, a drug company, has the overall goal of serving humanity. It is a very socially responsible company. Many employees may never have realized this dimension of the organization’s role in our society or given it much though either way. But once in this culture, developing drugs to help humankind is the guiding managerial framework. This does bring profit, but that is not the overarching goal. A scientist may find this a wonderful place to work even though they had not necessarily always thought about that aspect. If the scientist is more interested in money, they would be better off joining a company that believes that the responsibility of a company is to its stockholders first and foremost, so profit is the guiding factor.

##### Exercises

1. Students are to form teams of three to six people, depending on the size of the class. They are to discuss the importance of personality from both the perspective of the prospective employee and management.

##### Learning objectives:

To familiarize students with the role that personality plays at work, and to introduce the concept of there being multiple perspectives on this topic.

##### Preparation/time allotments:

This is a good icebreaker exercise at the start of the course. Make sure students are familiar with the basic definition of personality, and also try to create groups that have at least one practicing manager in them. This should take about 30–45 minutes.

##### Advantages/disadvantages/problems that might arise:

It might be difficult to generate a discussion if the exercise is done prior to the students reading the material or doing enough assessments to understand themselves. Also, the exercise is most effective if there are practicing managers in the class that can give management’s perspective on the issue.

1. Debate the concepts of personality as a fixed or changing set of traits that people possess.

##### Learning objectives:

To introduce the controversial topic of what personality really means, which traits are stable, and which traits can be learned.

##### Preparation/time allotments:

This exercise is most effective after the basic concept of personality has been covered. They should understand the differences between traits, states, and behavior.

##### Advantages/disadvantages/problems that might arise:

Point out that psychologists have different views on this topic, and that they will not come to one “right” answer. Rather, this gives them a flavor for how things are debated and discussed in this field.

1. In the same groups, have the students discuss their results on the personality test and what the implications may be for them in terms of a career.

##### Learning objectives:

To apply a personality assessment to the workplace; analyzing it in the context of career implications.

##### Preparation/time allotments:

This exercise will take about an hour, depending on the size of the group. It will be more effective if the students have already completed a group activity so that they will be comfortable enough sharing information about themselves.

They should also understand the basic concepts of survey design, such as validity. This is to make sure they don’t put too much weight on how they scored on a tool, especially early on in the course.

##### Advantages/disadvantages/problems that might arise:

This is a great icebreaker exercise to be used during the first part of the course. Students really enjoy talking about themselves, especially when it relates to a really important topic to them, such as their career. Also, make sure they understand that they are not required to reveal anything about themselves that they are uncomfortable revealing. Our personality and how we are wired are very personal to some people. Plus, it is inherent in many individuals to wish that they were different, thus, they may at first feel “inferior” to those that may have traits that they wish that they had.

* + **Suggestions/handouts for the instructor:**

Make sure everyone gets a chance to talk about themselves. You might announce when it is time to move on to the next person.

Make sure that they also understand that personality is only a part of management. Students should not feel like a career path is off limits to them simply because they scored a certain way on an assessment tool.

4. Students with like scores join into a group and do a case analysis provided by the instructor. After the groups have discussed the case, then they can present it and see if there are great differences in their interpretation based on personality traits.

##### Learning objectives:

To provide students with a tangible, real-world application of how personality impacts our thoughts and behaviors when analyzing a problem or a situation.

##### Preparation/time allotments:

Students should have at least a week to prepare the case. You could give them some class time to discuss the case in groups, and then present it during the next class period. The case can consist of any story that will generate different opinions. It is ideal if it is based upon business, such as the effects of a plant closing in a small town, but also could take the form of a newspaper editorial, or findings from an empirical study.

##### Advantages/disadvantages/problems that might arise:

You may have groups analyzing the case in the same way. If so, you could discuss whether this was because of similar personalities, or the way the case was designed.

* + **Suggestions/handouts for the instructor (if relevant):**

Choose a case that is fairly easy to read, but easy to generate discussions. Editorials are good, along with controversial business stories, such as one on “ethical lapses” of managers. You are trying to show how our personalities affect our decision making and our interpretation of events.

You could design this around an organization that the students will be studying later on in the course. This is a good way to integrate the assignments across different management topics.

###### Internet Links

1. <http://www.WetFeet.com>

Welcome to WetFeet, a site that tackles the age-old question: What do I want to do when I grow up? This site gives you industry guides, and salary wizards give you the facts on hundreds of careers, as well as advice, articles, and a discussion board to ease a transition from one’s current status. This site may be able to help you find the companies that fit your personality.

2. <http://www.yourpersonality.net>

These online pages guide you through a rich resource of sites on a variety of personality subjects. Please click on and take a personality test. Be prepared to compare the results from this test with the other personality tests you take.

1. <http://www.ship.edu/~cgboeree/perscontents.html>

Here is an incredibly rich resource on personality theories. Please click on an area such as Buddhist Psychology or one of the many theorists listed. Read the material presented. Then write a four- to five-page analysis of personality and how a good knowledge of personality assists management in being more effective managers.

What’s My Jungian 16-Type Personality? (I. A. 2.)

**Overview**

Just as the prior assessment instrument gave feedback on personality traits, so does this instrument. As noted, this is a very popular personality framework that classifies people in a number of categories. Many of the points made in the prior overview on management hold with this instrument in helping people find where they might fit in terms of organizational culture and career expectations.

If a person likes to work alone and is introverted, being an employee or manager in a company such as Saturn, which is built on teams, would not be a good fit for either. If a person is INTP, then Merck may be a good match. If you are INTJ, you might think about reading *Inc*. magazine and becoming an entrepreneur. However, a word of good sense: People do often change as circumstances do. If you are a 20-something, your personality is still forming. If you are a 50-something, much of your personality is formed and will typically only be altered if some major event such as being “downsized” occurs. If the status quo is stable for either the 20- or 50-somethings, the personality may be more stable. In these times of incredible change, the status quo seems unlikely. You may wish to keep this workbook and take it over the years, keeping your results each time and comparing them.

**Teaching Notes**

Students can use this instrument to help them with their major in conjunction with career choices. We often choose a career without really knowing what the forces are that shaped the choice. Often it is external in terms of wanting a job to make money, following in a direction that friends and parents have encouraged, or any of a variety of forces. This instrument can allow the students access to assessing their own internal personality classification at this point in their learning. It may or may not be helpful or followed. It is up to the student to make use of the tool. They may wish to ignore it if it runs counter to what they already think about themselves or reject it because it runs against what they want to be like. You might wish to note that all instruments, although carrying some validity, are not like formulas that if not followed “may blow up the chemistry lab.” They are indicators of something, which is not set in stone.

**Exercises**

1. Students can compare and contrast “What’s My Basic Personality?” with this assessment in groups of three to four. They can then share their impressions with the class as a whole.

##### Learning objectives:

To have students become familiar with both the 16 categories of the assessment, and to have them see how these categories manifest themselves in actual people.

##### Preparation/time allotments:

Have students take the test and score it prior to class. Each student should have five to ten minutes to discuss their personality with the rest of the group.

##### Advantages/disadvantages/problems that might arise:

Students may not agree with the category that they are in. In general, this can be caused by some scores being borderline between two categories. Discuss how this is a side effect of surveys, and to simply categorize individuals into 16 categories is only one small part of personality at work.

* + **Suggestions/handouts for the instructor:**

Make sure the discussion revolves around actual behaviors that students can see and observe. For example, if they say they are highly extroverted, have them give tangible examples, such as how much they enjoy meeting new people at parties. Make sure to translate this into concrete career examples. For example, politicians that are extroverted probably enjoy fund-raising dinners, and most likely would be successful at these dinners.

1. Students may want to administer the assessment to friends and then have a discussion. This would be especially helpful in a group setting such as with a club or sorority/fraternity, sports team, etc.

##### Learning objectives:

To show students how people with similar interests may have similar personalities.

##### Preparation/time allotments:

The assessment should be done outside of class. You could either have a paper to turn in regarding the findings, a class discussion, a group discussion, or a formal presentation.

##### Advantages/disadvantages/problems that might arise:

Sometimes it is hard to predict personalities based upon similar interests, especially with these 16 categories. Individuals on a sports team may be widely diversified. If so, steer the discussion towards the value of understanding individual differences and not stereotyping based upon an assessment tool.

3. Read about an organization in your text. Then try to apply the principles of the Jungian 16-Type Personality assessment to assess what is going on.

##### Learning objectives:

To apply the Jungian framework to actual organizations.

##### Preparation/time allotments:

This could also serve as a discussion item in class, a paper, or a formal presentation.

* **Advantages/disadvantages/problems that might arise:**

It is sometimes difficult to analyze an organization from a micro-perspective without stereotyping. It is easy, for example, to assume that computer programmers are introverted, when this may or may not be the case.

**Internet Links**

1. <http://www.marketpsych.com>

Carefully examine the website. Think about how personality and investments might be interrelated.

2. <http://www.careerbuilder.com>

This is a much-expanded job search engine. It often comes up with job opportunities not found on other top sites. Try going to this site and looking for companies that fit your personality style. In a one- to two-page impression piece, describe the companies and why you think they would fit your personality.

What’s My Emotional Intelligence Score? (I. E. 1.)

**Overview**

At one time, emotions were to be left at the door of companies. If we think back to Weber’s ideal type, Weber built in impersonality into one of the six major factors in structuring an ideal bureaucracy. But as sociologist Charles Perrow would note, we will never find the ideal bureaucracy because people who run bureaucracies “track a lot of emotional mud” into work. But contrary to prior concern about emotions (again there can be a gender issue here) tapping into emotional intelligence can be very useful to a company. EI has to do with a person’s ability to succeed in coping with environmental demands and pressures. Those who rank high on EI have the ability to accurately perceive, evaluate, express, and regulate emotions and feelings. Think of a brainstorming session, a crisis, and the discovery of an unknown factor that must be ferreted out. These are all situations when a person with a high EQ might be the best on in charge of a group. These are non-programmed situations that are happening every day in the dot-com world and the world of technology in general, as well in our more traditional firms. EQ has come of age.

**Teaching Notes**

This is a good place to have students compare their scores on the Self-Assessments to see if there is a pattern developing for them. You could then discuss what the implications of a pattern or lack thereof are for a future manager.

**Exercises**

1. You might wish to have a discussion or give a short lecture on IQ and why it has dominated our evaluation of students and others. You might wish to point out the old adage that the C students become the CEO because they are not as busy working hard for As but are learning the fine art of socializing and politicking. Students then discuss what effect they think IQ has had and what effect EQ might have on them and on organizations.

##### Learning objectives:

To discuss the role that EQ and IQ have on them personally.

##### Preparation/time allotments:

This should be about a 20-minute exercise.

##### Advantages/disadvantages/problems that might arise:

Be careful with the students that score low on this. As with IQ, in our society this has a negative connotation. For those students that score really low, have them look at individual questions and determine which scores will naturally improve as their experience improves.

2. Debate IQ and EQ.

##### Learning objectives:

To compare the two constructs of EQ and IQ.

##### Preparation/time allotments:

This should be about a 20-minute exercise.

##### Advantages/disadvantages/problems that might arise

You may have many students that have not taken an IQ test. If so, they still should be able to discuss it conceptually. Also, with EQ, you might have them discuss which of the dimensions of EQ are learnable, and which ones they think are more trait-like.

**Internet Links**

1. <http://www.queendom.com/tests/iq/verbal_iq_a_access.html>

This assessment measures your verbal abilities and gives you an opportunity to learn new vocabulary with the *Verbal-Linguistic Intelligence Test*. Please take the test and then be prepared to discuss the instrument in class as it might relate to EQ.

2. [http://www.queendom.com/tests/minitests/procrastination\_short\_ access.html](http://www.queendom.com/tests/minitests/procrastination_short_%20access.html)

Find the search bar and look for the procrastination test. Take the test and then relate the results to how being or not being a procrastinator might impact your emotional IQ. Be prepared to discuss in class.

BUILDING A TEAM

Learning Objective: 1-5

AACSB tag: Reflective Thinking

* 1. An Experiential Exercise: Sharing and Receiving Information

The goal of this exercise is to encourage students to build a relationship with each other and the instructor. Instructors will model the supervisory behavior discussed in the chapter by taking time to listen and discuss the student’s responses to questions A, B, C, and D. Allow time for students to respond and then have them transition to small groups for an informal discussion. After the groups have processed the information, have them introduce one another and share their responses. Instructors should use the board or chart paper to track response trends and then engage the class in an open discussion of the responses to the questions.

MENTORING OTHERS

Learning Objective: 1-3

AACSB tag: Application of knowledge

Have the students think about and discuss the objectives and value of mentoring as a part of their role as a supervisor. Use the steps in the process as a discussion guide:

STEP 1: Communicate honestly and openly with your protégé́.

STEP 2: Encourage honest and open communication from your protégé́.

STEP 3: Treat the relationship with the protégé́ as a learning opportunity.

STEP 4: Take the time to get to know your protégé.

COMMUNICATING EFFECTIVELY

Learning Objective: 1-4

AACSB tag: Analytical Thinking

* 1. Develop a three- to four-page response to the following question: Are supervisors in a no-win situation in an organization?

Encourage students to explore both sides of the question as they work to formulate a response. Have them substantiate their position by including supporting data. Finally, encourage them to defend and support one of the two positions they researched. Use this as an in-class discussion to explore the issues of supervision.

SUGGESTED ANSWERS TO THINKING CRITICALLY CASE STUDIES

CASE 1.A: Transition to Supervisor

* 1. If you envision transitioning into a supervisory position, what can you do to ensure you don’t end up like Tristan?

Learning Objective: 1-2

AACSB tag: Reflective Thinking

Becoming a manager does not necessarily require you to abandon the relationships you enjoyed before becoming a manager. If you had common interest outside of work before you became a supervisor, there is no reason the social association cannot continue. However, your relationships with operative employees are bound to naturally change. You are now a supervisor and, as such, your priorities are not the same as those of operatives. Chapter 1 points out the fact that, as a supervisor, you will have to play many roles and wear many different hats. Can anyone successfully wear the hat of both management and labor?

* 1. What supervisory competencies should you work to develop? Why?

Learning Objective: 1-5

AACSB tag: Reflective Thinking

Successful supervisors must possess four critical competencies: technical, interpersonal, conceptual, and political competencies. Supervisors require technical competence—the ability to apply specialized knowledge or expertise. It’s difficult, if not impossible, to supervise employees with specialized skills effectively if you don’t have an adequate understanding of the technical aspects of their jobs. The ability to work well with employees, understand employee needs, communicate well, and motivate others—both individually and in groups—constitutes interpersonal competence. Strong conceptual abilities allow a supervisor to see that the organization is a complex system of many interrelated parts; strong conceptual abilities help managers make good decisions. Political competence is the supervisor’s ability to enhance his or her power, build a power base, and establish the “right” connections in the organization.

* 1. Which of the four management functions do you believe most supervisors need help with? Why do you think this is the case?

Learning Objective: 1-3

AACSB tag: Reflective Thinking

A technical job allows the individual to directly exercise his or her skill and expertise on the job. Individuals working in a technical capacity are often responsible only for themselves in the workplace. Supervisors, on the other hand, carry the responsibility of an entire product line or division, for example, including all employees. Supervisors also likely share greater input in the organizational planning process.The ability to work well with people, understand their needs, communicate well, and motivate others—both individually and in groups—constitutes interpersonal competence. Many people are technically proficient but interpersonally incompetent. Supervisors must have good interpersonal skills to communicate, motivate, negotiate, delegate, and resolve conflicts.

* 1. The role of supervisor can be considered a first step toward management. What are the benefits and potential disadvantages of pursuing a management career?

Learning Objective: 1-6

AACSB tag: Reflective Thinking

Individuals in management may make more significant contributions in the planning process and have more direct input into the overall daily operations of the organization. In addition, members of management play a more direct role in motivating workers and, perhaps, in shaping organizational culture. On the other hand, managers are often required to work long hours. They are responsible for the overall legal and ethical actions of the organization, as well as responsible for the organization’s efficiency and profitability. Managers often “wear a lot of hats” and often face role overload.

CASE 1.B: Leading the A-Team

1-14. Are you surprised at what Google found out about “building a better boss”? Explain your answer.

Learning Objective: 1-3, 1-5

AACSB tag: Reflective Thinking

The surprise was that previously in the Google context trainees were always reminded that to be a supervisor, particularly on the engineering side, they needed to be as deep or deeper a technical expert than the people who worked for them. Now, Project Oxygen turned that idea upside down as Google revealed that the importance of technical expertise was ranked number eight (very last) on the list.

1-15. What’s the difference between encouraging supervisors to be great supervisors and knowing what being a great supervisor involves?

Learning Objective: 1-5, 1-6

AACSB tag: Reflective Thinking

Just telling supervisor trainees they are expected to be great supervisors at Google and encouraging them to be great does not make it so. When Google makes the supervisory expectations clear, and does its part by providing ongoing supervisory training that includes individual coaching and performance review sessions, it displays organizational commitment that builds success into the culture.

1-16. Do you agree with Google’s rank ordering of the eight characteristics of most effective supervisors? Why or why not? How would you order them and why?

Learning Objective: 1-3, 1-5, 1-6

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This response will vary between students. Use this opportunity to discuss the different situational variables that impact the approach used by successful supervisors.

1-17. How do Google’s eight characteristics of most effective supervisors align with Katz’s list of supervisory competencies? With the four management functions?

Learning Objective: 1-3, 1-5

AACSB tag: Reflective Thinking

Google’s list of eight characteristics of most effective supervisors aligns well with Katz’s four critical competencies. Competency in the area of technical, interpersonal, conceptual, and political can be seen in their focus on knowledge of the task, awareness of your employee, vision of the future, and the focus on end results. Additionally, the four management functions of planning, organizing, leading, and controlling can be identified among the eight characteristics.