

# **INFORMATION GUIDE**

**Leadership, Management  
and Personal Development**

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There are two parts to this information on our Leadership, Management and Personal Development training solutions.

Firstly there is an overview of hr TEAM – who we are, our approach and how we work with our clients.

The second part provides you with the detail of the concepts and learning materials that we have developed.

If you would like further information on specific items having read this guide, or if you would like to arrange an initial conference call or meeting, please contact us.

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## **1. INTRODUCTION TO HR TEAM**

We are a training and development consultancy working in two specific areas:

- ⇒ Leadership, Management and Personal Skills Development
- ⇒ Sales Negotiation and Sales Management Skills development

Established in 1989, we have many years experience working with a number of clients, in a range of market sectors including I.T., Telecommunications, Manufacturing, Business Consultancy, Professional Service firms, Electronics and Construction.

As part of ELDA – The European Leadership Development Alliance, we work with clients in developing and delivering pan-European learning solutions. ELDA members are represented in the U.K., Germany, France, Italy, Spain, Austria and Hungary. Our web site has full details of ELDA partners and locations

## **2. OUR AIMS, VALUES AND APPROACH**

When we founded the company we had a clear vision of what we wanted to be, the services we would offer and how we wanted to establish and develop relationships with our clients. Of course, since then the world, the environment, our client's needs and expectations and the economic conditions have changed! Like any business we have evolved and developed, but our underlying values and beliefs are, we believe, as valid today as they were then

### **Aims and Aspirations**

To develop long term business relationships with our clients, to become an integral part of their team, for mutual benefit



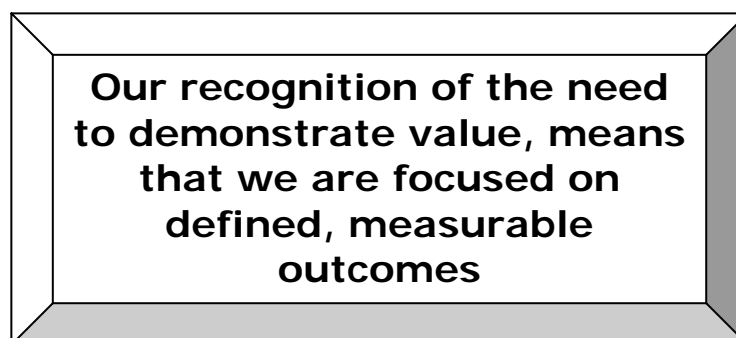
***How do we go about achieving those aims and expectations?***

It is a reasonable assumption that any business would have an aim of developing long term client relationships!

We understand that this relationship has to be earned. How? We believe by delivering value.

Value at two levels . . .

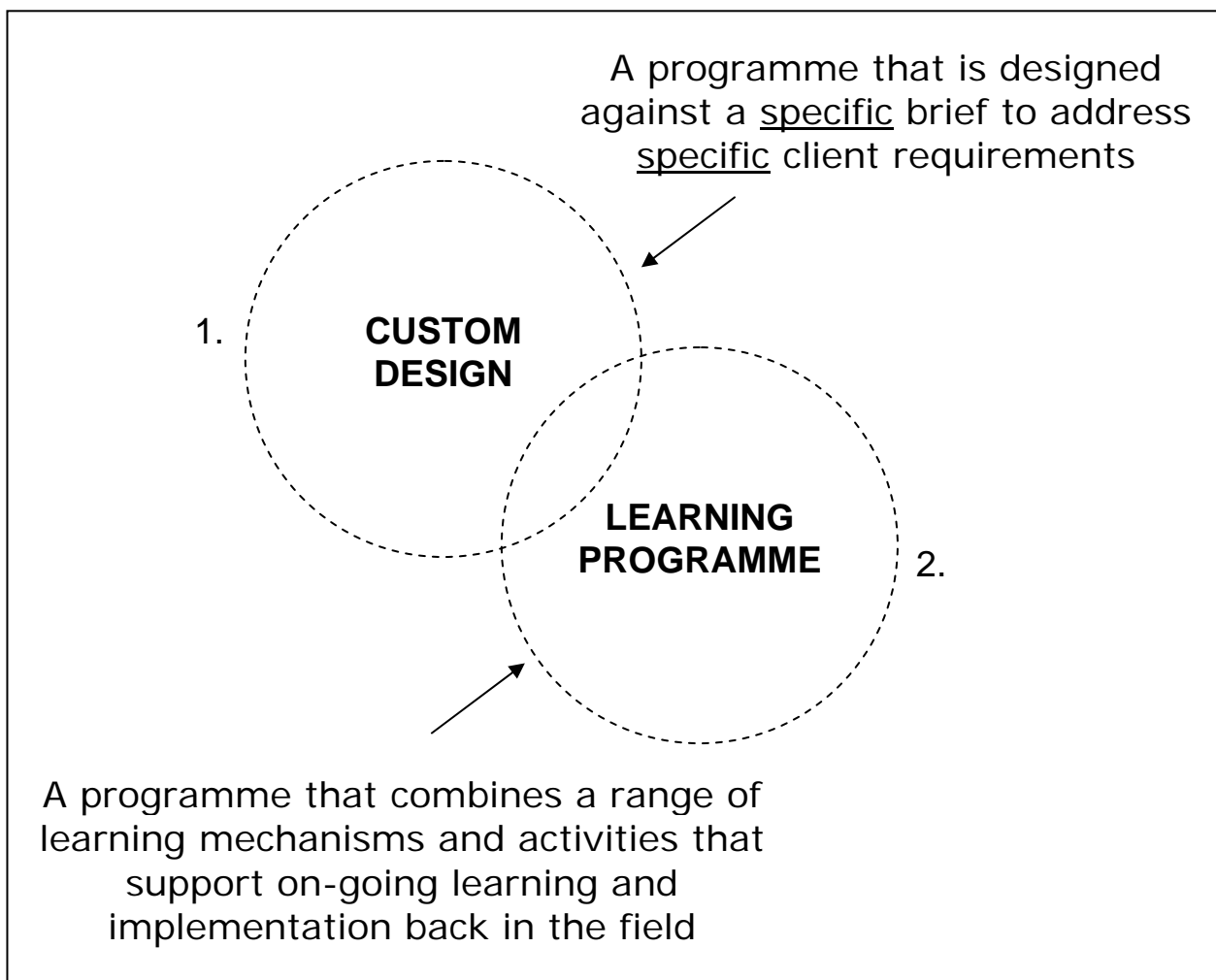
- ⇒ To contribute to the ongoing skills and knowledge of the people in our client's business with whom we are working
- ⇒ To contribute to the achievement of our client's business goals and strategies by ensuring that the training and development we deliver is focused, relevant and aligned to the business priorities

A 3D rectangular box with a grey shadow on the right and bottom sides, containing the following text:

**Our recognition of the need  
to demonstrate value, means  
that we are focused on  
defined, measurable  
outcomes**

## ***Approach***

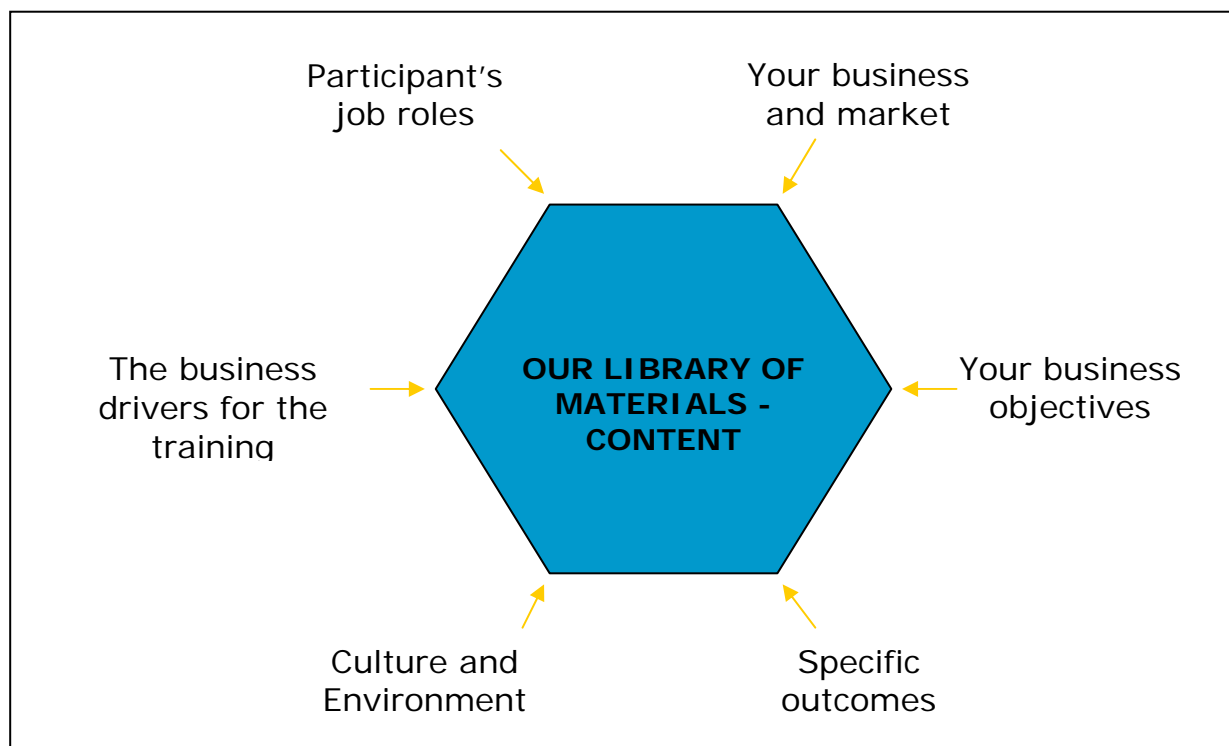
We have described our aims. We have described the need to demonstrate value to achieve them. What is our approach in converting these aims and plans into reality?



## **Custom Design**

Tailored, bespoke, custom designed – these are all terms commonly used by training consultancies. What do we mean by “custom design”? Firstly, we do not claim to reinvent wheels for every programme! Over many years we have designed, developed and refined a massive **knowledge bank** in management and leadership training and development. We have a library of models, concepts and materials. These are used as the start point in developing a specific client programme. From this we can adapt, refine and add to ensure absolute relevance. This is the first stage of custom design.

We then build in the **6 areas of context**...



The result- an integrated programme that is focused and relevant to the participants and the client's business.

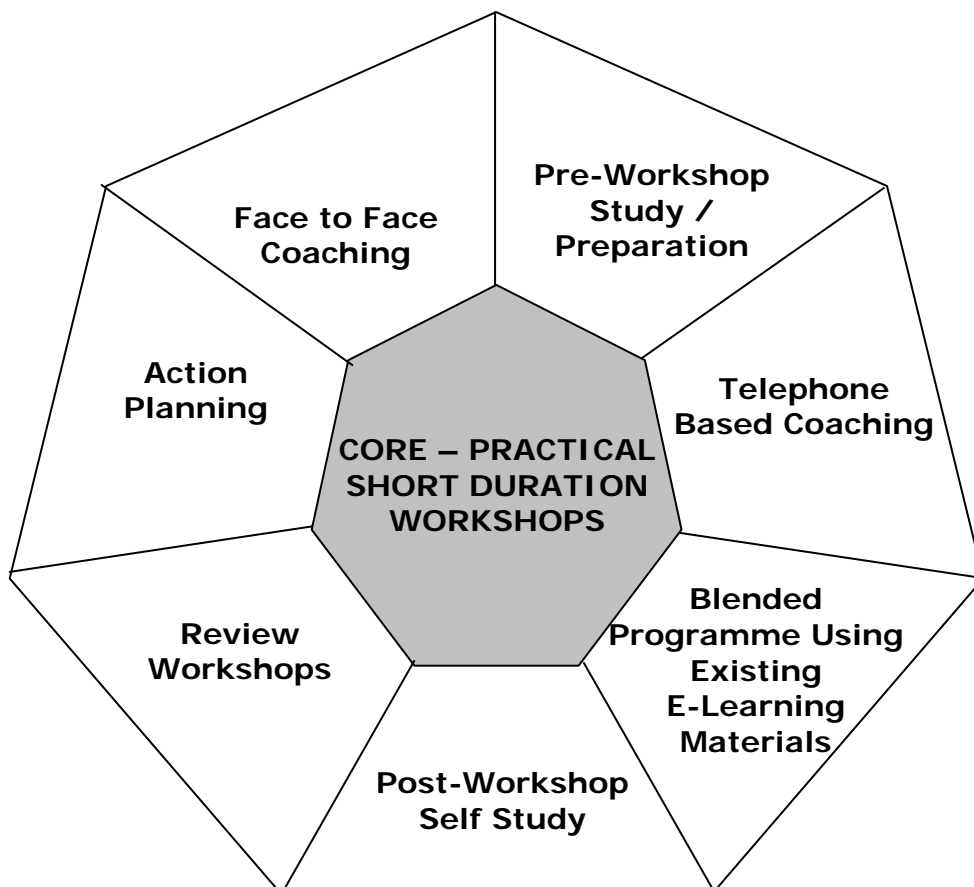
## ***Learning Programmes***

We do not believe that attending “isolated training courses” is the most effective way for people to learn or to be able to apply what that they have learned back in the workplace.

A learning programme, the core of which is a series of short duration, practically based workshops, involves a range of learning mechanisms.

As we believe in custom design, we do not believe that each programme must involve all of the examples below. We will recommend what is practical and relevant for any given situation.

### **Learning programme – possible elements...**



- ✓ Time effective – minimises time away from the workplace
- ✓ Engages people in on-going development
- ✓ Maximises implementation and improved performance

*Custom Designed Learning Programmes in Leadership, Management and Personal development*

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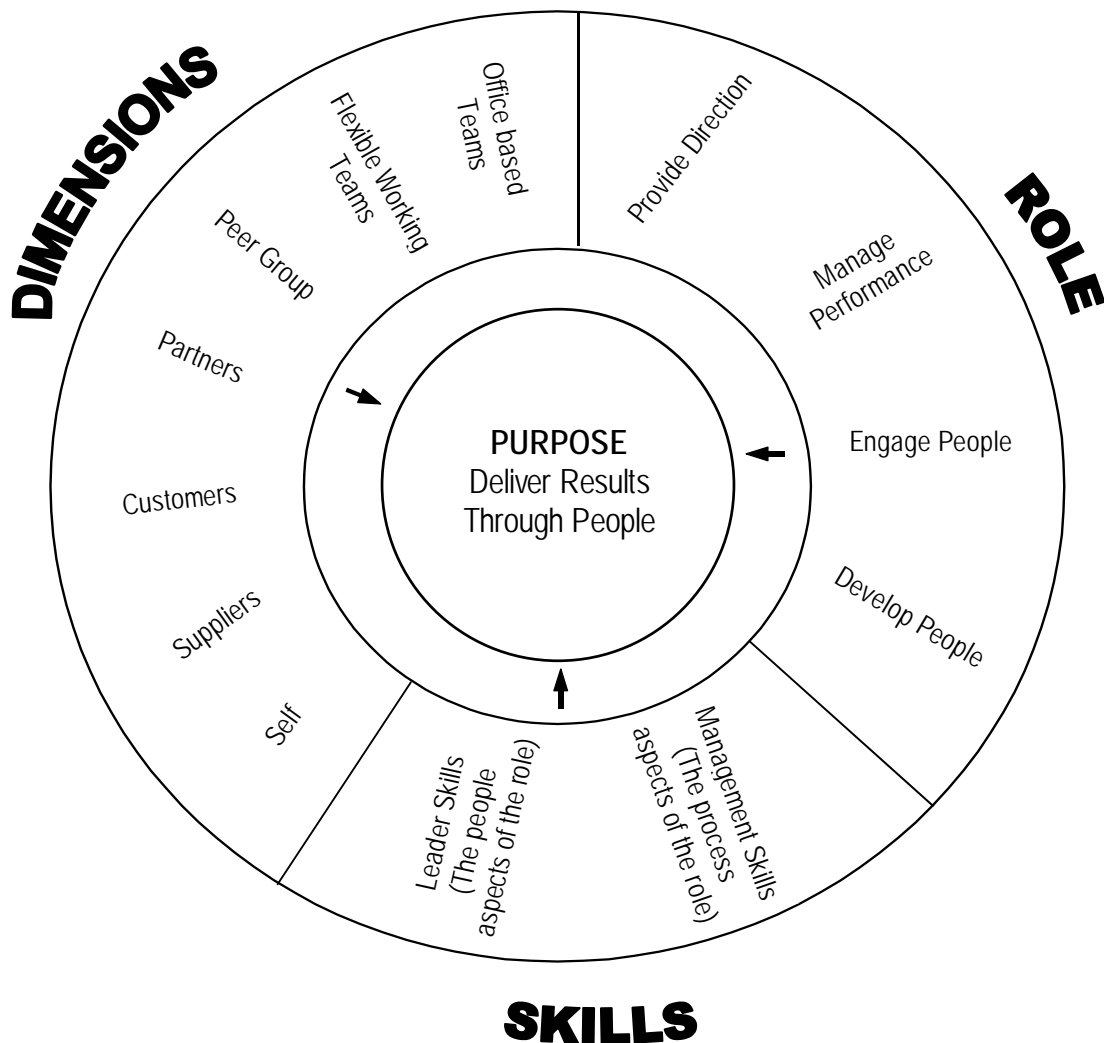
### **3. LEADERSHIP AND MANAGEMENT OVERVIEW**

To provide a framework for all Leadership and Management development programmes we introduce the Leader – Manager Model. This visually defines the purpose and the dimensions of the role. In programmes where many topics may be covered the model provides a reminder and context for where a specific topic fits in the overall management function.

If you have your own in house models or concepts then we can, of course, base our programme around these. A key aspect of our approach is to develop a custom programme based on your requirements.

Following the model, sections 5 – 12 of this guide provide example contents for specific topics with the leadership and management arena

**Leader / Manager Model**



The model is based on ...

- 4 dimensions of working – managing self, teams, peers, projects and tasks
- 2 skill sets – Process, people
- The need for a balance of skills to be effective

***Process Skills (Management)***

**SETTING GOALS  
ACTION PLANNING  
ORGANISING  
IMPLEMENTING  
ACTIONS  
CONTROLLING EVENTS  
EVALUATING**



***People skills (Leadership)***

**COMMUNICATION  
INFLUENCING  
COACHING  
MOTIVATION  
DEVELOPING TEAMS**



**MANAGING PERFORMANCE  
ACHIEVING RESULTS**

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#### **4. A DIAGNOSTIC TOOL – LEADER MANAGER PROFILE**

The leader – manager profile is a competence model, which details 5 key competence areas, and within those, 27 competence descriptions.

Developed over a period of time as a generic model it can be fine tuned and adapted for specific management roles

You may have your own model already in place, in which case we will develop a programme around it. If not, and you want to put in place a competence model, our profile can be a useful starting point.





COMPETENCE AREA	RANKING	N/A	CURRENT COMPETENCE LEVEL					H	
	A – B – C		L	1	2	3	4	5	6
	<b>2. Leading and developing people</b>								
1) Achieves the correct balance of involving the team in decision making and providing clear direction by appropriately applying a range of leadership behaviours									
2) Works with the team in developing a way of working that brings out the best in all team members									
3) Reviews performance, sets direction, and addresses shortfalls in a decisive and positive manner.									
4) Actively takes a coaching role and provides learning / development opportunities for the team members.									
5) Encourages team members to take initiative, agreeing set parameters for individual decision making.									
6) Works with individual team members to ensure that their motivations and personal goals are addressed.									



COMPETENCE AREA	RANKING A – B – C	N/A	CURRENT COMPETENCE LEVEL						H
			L	1	2	3	4	5	

**3.Planning and analytical**

1) Agrees and defines clearly defined goals at a team and individual level.									
2) Implements concise action plans which define the tasks with timescales and responsibilities, that must be completed to achieve the goals									
3) Has mechanisms to measure progress and performance against a plan, whilst avoiding unnecessary and time wasting reporting procedures									
4) Responds to performance shortfall by analysing the problem and, by using the resources available, generates solutions									
5) Balances plans with the real world of the unexpected, and re-prioritises accordingly									

COMPETENCE AREA	RANKING A – B – C	N/A	CURRENT COMPETENCE LEVEL						H
			L	1	2	3	4	5	

**4. Communication and influencing**

1) Communicates with team members, colleagues, and business partners openly and confidently									
2) Takes time to understand the interests and position of others									
3) Approaches conflicts by responding not reacting. Objectively establishes the common ground, and works constructively to generate solutions to resolve the differences.									
4) Practices balanced negotiation in business meetings so that there are win-win outcomes.									
5) Is prepared to be influenced									



COMPETENCE AREA	RANKING	N/A	CURRENT COMPETENCE LEVEL						H
	A – B – C		L	1	2	3	4	5	6
	<b>5. Leading and managing change</b>								
1) Interprets and actions change generated by strategic direction, changed circumstances or economic conditions									
2) Is proactive in generating change in own area, and proposing change elsewhere, where opportunities and potential performance improvements have been identified									
3) Actions change systematically by developing and implementing action plans, control and evaluation mechanisms									
4) Appreciates the impact of change on people and ensures that the rationale is clearly communicated and concerns listened to and acknowledged.									
5) Involves the team in change implementation to ensure the best outcomes and maximum commitment.									
6) Is prepared to take risk on a considered basis.									

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## **5. LEADERSHIP AND MANAGEMENT FOUNDATION**

A foundation programme that can be developed for different experience levels is designed to develop what we believe are the fundamental skills for leaders and managers.

To emphasise our custom design approach, the example topics on the following page are not fixed – they represent what would typically be covered in such a programme

The essence of the approach is to distinguish between the leadership and management dimensions and to establish that total effectiveness requires a balance of people and process skills

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***Leadership and Management Foundation –Examples of contents /  
topics covered***

- ✓ The leader –manager model
- ✓ Management process
  - Define objectives
  - Action planning
  - Organising
  - Implementing
  - Controlling
  - Evaluating
- ✓ Defining leadership
- ✓ The elements of leadership
  - Communicating
  - Influencing
  - Coaching
  - Motivating
  - Developing teams
- ✓ Leadership and influencing styles using our influencing styles model
- ✓ Understanding motivation and how to apply this understanding

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**6. RECRUITMENT AND SELECTION –EXAMPLE OF CONTENTS /  
TOPICS COVERED**

- ✓ Overview of the recruitment process
- ✓ 4 point model – Planning, Preparation, Interview, Selection
- ✓ Some common pitfalls
- ✓ Job / role specification / competence profile for the role
- ✓ The “Person spec” – knowledge / skills / experience required
- ✓ Sourcing of applicants
- ✓ Application analysis and decision making
- ✓ Preparing for the interview – checklists
- ✓ The importance of questions – first and second level questions, situational based questions
- ✓ The interview, using the 5 point model – Introduction, first level questions, invite questions, second level questions, summary/close
- ✓ Positive interview behaviours
- ✓ Tackling the red flags
- ✓ Note taking
- ✓ Selection process using comparative grids

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**7. COACHING SKILLS –EXAMPLE OF CONTENTS / TOPICS  
COVERED**

- ✓ What is coaching?
- ✓ Differentiating the manager and coach role
- ✓ Introduction to GROW model
  - Goal setting
  - Reality
  - Options
  - Will
- ✓ Benefits of coaching – to the individual, the manager, the business
- ✓ Directive and non directive coaching styles
- ✓ The importance of questioning and listening
- ✓ Feedback skills

The head of our coach team, Jeremy Cassell, is an ICF (International Coach Federation) accredited coach

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## **8. PERFORMANCE MANAGEMENT**

There are two areas where we work with clients in the Performance Management area.

1. In delivering a performance management session if one does not exist in the client's business. Training of managers and staff in the effective implementation would then follow.
2. When a performance management system is already in place, and there is a need to develop management skills in using the system positively and effectively.

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***Performance management –Example content / topics covered***

- ✓ The purpose of Performance Management
- ✓ Creating a balance of
  - Reviewing the past, defining the future.
  - The business need, the individuals' development.
  - Short, mid and long term goals.
- ✓ Converting a process into a way of leading, managing and working with the team and individuals.
- ✓ Formal and informal review sessions, the concept of ongoing – periodic – annual.
- ✓ Competence models as one of the tools in the performance management and review process.
- ✓ Planning formal review sessions.
- ✓ The positive communication and influencing styles in performance management and review.
- ✓ Managing the individual's expectations
- ✓ Agreeing and implementing performance development actions

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**9. DEVELOPING TEAMS – EXAMPLE CONTENT / TOPICS COVERED**

- ✓ Defining teams and teamwork
- ✓ The link between effective team working and performance
- ✓ Team leaders and team members – who has the responsibility for effective team work?
- ✓ High performance teams, using a 14 point profile
- ✓ How is the team perceived today? How does it want to be perceived?
- ✓ Developing a team code of practice – “How we work together and relate to other teams”.
- ✓ Implementation actions to translate the code to reality.

Note. We often use the “Strength Deployment Inventory” (SDI) in team development workshops. For more information on the SDI, visit [www.personalstrengthspublishing.co.uk](http://www.personalstrengthspublishing.co.uk)

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**10. MANAGING MEETINGS – EXAMPLE CONTENT / TOPICS  
COVERED**

- ✓ Is a meeting necessary? – What is the purpose?, can the objective be reached without a meeting?
- ✓ Positive and negative meeting experiences.
- ✓ 14 point preparation checklist.
- ✓ Meeting leader role overview.
- ✓ Managing time and the agenda.
- ✓ Establishing and agreeing 'meeting rules'.
- ✓ Ensuring balanced participation.
- ✓ Facilitating discussion.
- ✓ Managing sidetracks.
- ✓ Clarify and committing.
- ✓ Minutes and follow up.
- ✓ Contributing as a participant.
- ✓ Pre meeting, meeting and post meeting checklists.

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**11. MANAGING REMOTE TEAMS – EXAMPLE CONTENT / TOPICS  
COVERED**

As more and more people work flexible working patterns, including home working, more managers now manage remote teams

- ✓ The key differences between office based and remote teams.
- ✓ Linking remote management to an established management model.
- ✓ The concept of the 'boundary manager', the most effective approach in a "not same time same place" environment.
- ✓ What remotely based staff look for in their manager
- ✓ Establishing a team remote working code using a 10 point model.
- ✓ Communication in a remote environment – the formal and informal channels.
- ✓ Handling issues caused by remote working
- ✓ Making the most of anchor days and team meetings

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**12. MANAGING EXTERNAL SUPPLIERS –EXAMPLE CONTENT /  
TOPICS COVERED**

As many company structures are changing, with a trend towards outsourcing, managers now have to manage external supplier relationships

- ✓ Supplier lifecycle concept
- ✓ Defining supplier selection criteria
- ✓ How to work with procurement
- ✓ Legal and risk groups
- ✓ Meeting and evaluating potential suppliers
- ✓ Managing the RFI (Request for Information) and ITT (Invitation to Tender) processes
- ✓ Working with the supplier on the SLA (Service Level Agreement) and KPI's (Key Performance Indicators)
- ✓ Leading and managing in the context of an external / outsource supplier
- ✓ Understanding supplier drivers
- ✓ How to develop the supplier relationship
- ✓ Organising and managing supplier reviews
- ✓ Defining the breadth and depth of the relationship to gain most value
- ✓ Developing supplier performance
- ✓ Managing supplier performance issues
- ✓ Negotiation throughout the contract management phase
- ✓ Conflict resolution
- ✓ Managing supplier exit / renewal

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**13. PERSONAL DEVELOPMENT TOPICS – OVERVIEW**

There are a number of skill areas that are relevant equally to leader/ managers and non management staff.

We have grouped these together as “Personal Development Topics”

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**14. TIME MANAGEMENT –EXAMPLE CONTENT / TOPICS COVERED**

- ✓ The effectiveness cycle - Getting planned, getting organised and staying focused.
- ✓ The “10 commandments” of time effectiveness.
- ✓ Focus on goals.
- ✓ The second element of the cycle – organisation
  - Task analysis using the 3 tasks definition model.
  - Prioritisation matrix, using 6 point matrix.
  - Constructing the ideal week.
- ✓ Having a time system and using it. The importance of self discipline.
- ✓ Investing in time to make time.
- ✓ Delegation.
- ✓ The third element – Staying focused – holding on to priorities, conviction and Managing time related conflicts.
- ✓ The behavioural skills of time management.
- ✓ Handling time issues, induced stress.
- ✓ Managing sidetracks and negotiating.

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**15. INFLUENCING AND COMMUNICATION SKILLS – EXAMPLE  
CONTENT / TOPICS COVERED**

- ✓ The essence of communication – a coding, de-coding process.
- ✓ The underlying behaviour for effective communication and influencing, based on an assertion model.
- ✓ The spectrum of influencing styles available
- ✓ Understanding the perspectives of others
- ✓ The importance of asking questions
- ✓ Listening levels model.
- ✓ How to propose action using rationale and balance.
- ✓ The behaviours that build rapport
- ✓ Managing conflicts using the response V reaction model

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**16. NEGOTIATION –EXAMPLE CONTENT / TOPICS COVERED**

- ✓ Definition of negotiation
- ✓ The three approaches to negotiation – balanced, conflict, compliant
- ✓ The principles of balanced negotiation, the concept of win-win
- ✓ Planning for a negotiation meeting
  - Defining optimum and fall back positions
  - Assessing what the other side will ask for
  - Establishing the BATNA – Best Alternative to a Negotiated Agreement
  - Calculating financial implications
- ✓ Managing the negotiation meeting
  - Applying the 6 point meeting framework
- ✓ How to influence and build the relationship
  - Seeing the other side's perspective
  - Focusing on common ground
  - Understanding the interests behind the stated positions
- ✓ The behaviours needed to reach agreements
- ✓ Countering aggressive tactics in others

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**17. TRAIN THE TRAINER –EXAMPLE CONTENT / TOPICS COVERED**

- ✓ Key principles
  - The learning cycle
  - Trainer / facilitation styles
  - Learning styles
- ✓ Programme design
  - Agreeing outcomes
  - How to structure a programme
  - Structure options
  - Mapping and sequencing content
  - The range of learning mechanisms
  - How to evaluate
  - Session structure framework
  - Designing materials
  - Use of visuals
  - Facilitator guides
  - The importance of positioning in the opening session
- ✓ Delivery
  - The trainer portrait – profile of an effective trainer/facilitator
  - Directive and non-directive input styles
  - Structuring and managing practical / application sessions
  - Feedback skills
  - Handling specific participant issues
  - Delivery styles
  - Building a bridge back to the workplace

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**18. WRITTEN COMMUNICATIONS –EXAMPLE CONTENT / TOPICS  
COVERED**

- ✓ The nature of communication – the coding and decoding process, the specifics of written communication.
- ✓ Separating the thinking and the writing process
- ✓ Structuring and thinking
  - The importance of structuring the document to that of the reader's mind – to ensure understanding and assimilation
  - Structuring the introduction to create interest and to establish context. Applying the 5 point model – Subject, purpose, status, driver, check.
  - Creating a logical hierarchy and structure for the main body using an 'organogram'.
  - How to build a bridge between the introduction and the main body.
- ✓ The writing process
  - Translating the thinking to a written structure
  - How to represent the thought process in the document format and layout.
  - Using clear concise language.
  - Readable writing using the fog index model

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**19. PRESENTATION SKILLS –EXAMPLE CONTENT / TOPICS  
COVERED**

- ✓ Introduction – the four elements of an effective presentation  
INTEREST, ENLIGHTENMENT, MOTIVATION, COMMITMENT.
- ✓ The skill sets – preparation, design and on-feet skills
- ✓ Preparation and design
  - Audience analysis
  - Purpose
  - Content
  - Structure
  - Visuals
- ✓ Structuring – using a 7 point plan
- ✓ Structuring the main body using an 'organogram'. The rule of 7
- ✓ On feet skills
  - What you say
  - How you sound
  - What you look like
  - How you manage the audience
- ✓ Checklists for language
- ✓ Displaying confidence, managing nerves
- ✓ Pace, Pitch, Inflection, Articulation
- ✓ Body language
- ✓ Managing questions and the audience

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**20. PROJECT MANAGEMENT –EXAMPLE CONTENT / TOPICS  
COVERED**

- ✓ What is a project?
- ✓ Project model – 4 point plan – Defining, planning, implementing, completing.
- ✓ Project manager role and relationships, sponsors and stakeholders
- ✓ A framework for project management – management and leadership perspectives
- ✓ Project definition – Aims, success criteria, objectives, milestone planning
- ✓ Communicating and influencing
- ✓ Project planning
  - Scoping
  - Resources
  - Risk assessment
  - Activity planning
  - Establishing the team
  - Building the 'Commnet'
- ✓ Implementing – controlling, reporting, resolving problems, taking contingency actions.
- ✓ Completing – handover, lessons learned

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## **21. INTERNAL CONSULTANCY**

As business structures change, many managers and specialists now have an internal consultant role. This trend is likely to continue as more companies move towards more flexible flat organisations.

Whilst an internal consultant requires many of the “traditional” management and leadership skills, the context and the environment are quite different.

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***Internal Consulting –Example topic / content coverage***

- ✓ How do we define the term “consultant”?
- ✓ The internal consultant’s role.
- ✓ The client’s expectations of a consultant
- ✓ How the consultant differs from that of line management
- ✓ How to identify the client’s needs, requirements, motives and drivers
- ✓ The importance of providing value
- ✓ Data analysis
- ✓ Influencing and recommending the most appropriate communication styles to use
- ✓ Understanding your client’s behavioural style
- ✓ Managing client expectations
- ✓ Facilitating and brokering agreements
- ✓ Establishing rapport and building relationships

## **22. CLIENT EXAMPLES**

Below is a list of examples of clients that we have worked with;

- Akibia
- AXA Sunlife
- BIS Banking Systems
- BMW [GB]
- Bank of Ireland
- Belmont International
- Bexley Council
- Bio Products Laboratory
- Birse Construction
- Blue Circle Cement (LaFarge)
- Cable & Wireless Communications
- Chemaide
- City & Guilds
- DHL
- Ernst & Young
- Frame Telecommunications
- Freight Traders
- Future Electronics
- GEAC Enterprise Solutions
- General Motors (Financing Division)
- General Practice Management Services
- Government Office for the East
- HBOS
- Heineken
- Hitachi Europe
- Hyperion Solutions
- IBAH (Euro Bio Pharm)
- IBM
- Informix Software
- Infospace
- Interforward
- iPlanet
- Kent County Council
- Kurt Salmon Associates
- Lawrence Industries
- Law South
- Learned Information Europe
- Lincolnshire NHS Trust
- Lloyds TSB Insurance
- Lotus Development Corporation
- Lucent Technologies
- Madge Networks
- Marcam Europe
- Martindale Hubbell (part of Reed Elsevier)
- Melroe Europe (part of Ingersoll Rand)
- Merck Pharmaceuticals
- Meto
- Metro Group
- Motorola
- National Australia Bank Group
- Nestle
- Oracle Corporation
- Parker Hannifin
- Polar Electronics
- Punch Retail
- QSE
- RCP Consultants
- Ready Mixed Concrete (RMC Group)
- Sanctuary Housing
- Scope
- Sequoia Technology
- Solid State Supplies
- Sun Microsystems - Ireland
- Sun Microsystems - UK
- Thanet District Council
- Trend Communications
- Unisys
- Wholesale Fittings
- Worldspan Services

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### **23. NEXT ACTIONS**

We hope that you have found this Information Guide informative and interesting.

#### **Next actions?**

- ✓ If you would like more information on any specific topic, we can provide example materials
- ✓ We can arrange an initial telephone discussion for a general information exchange and to establish the common ground between the training needs in your management team and our capabilities
- ✓ You may have a specific training project to discuss; in which case we can arrange a meeting. After a briefing we will respond with a considered proposal

**Examples of materials for a range of the topics covered in this guide are available on request.**

**Please email :**

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**Or call us on**      **01435 865 711**

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## **24. OTHER HR TEAM SERVICES**

Management development is one of our core areas.

The other is Sales and Sales Management. An **Information Guide** is available on this aspect of our services and covers...

- Match Selling®
- Foundation in Sales skills
- Account Management and Development
- Negotiation
- Presenting Skills
- Proposal Writing
- Sales Management and Leadership
- Coaching Skills for Sales Managers
- Working with / Managing Distributors and partners

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**THIS GUIDE IS ALSO AVAILABLE ON OUR WEBSITE**