



# BOTTOM-LINE LEADERSHIP

## FIRST LEVEL MANAGERS

### OUTLINE

#### Day 1

##### Overview and Introductions

- Course Introduction
- Objectives and Components
- Course Agenda: Three days
- Team Introductions and Forming Exercise
- 4 Key Roles of a Supervisor
  - Productivity Manager
  - People/Team Leader
  - HR/Legal Administrator
  - Strategic Business Decision-Maker
- Team Formation
- Work-People Matrix
- Computer Orientation, Demo and Exercise

##### Productivity Manager (Role #1)

- Work Standards: Review
- Skills, Skills Matrix and the Staff Report
- Identify the factors that drive productivity
- Options to Increase Capacity: Overtime and Temporary Workers
  - Forecasting work volumes
  - Capacity Analysis
  - Resource Allocation

##### Assignment #1

- Simulation Demo: Making overtime assignments
- Enter decisions into simulation for week #2
- Have a team introduction meeting
- Run simulation
- Review and analyze results

##### Performance Tracking: Management Score Card: Key Performance Indicators

- Update Scorecard Key Performance Indicators

##### Leading for Service and Quality

- Determine a productivity strategy
- Strategy for improved quality and customer service

##### Finances and Cost Controls

- Introduction and evaluation of budget
- Revenue vs. expense report
- Identify cost drivers
- Develop a Cost Reduction Strategy

##### Assignment #2

- Make assignments and staff decisions
- Implement productivity, communication and staffing initiatives
- Establish a cost baseline
- Simulate week #3

##### Resource Planning, Head Count and Hiring Strategy

- Labor Analysis Report
- Set head count level and hiring strategy
- Identify criteria for best new hires
- Identify best candidates available

##### Interviewing

- Utilize "Hiring/Interview Worksheet" to identify major job tasks and skills
- Write behavioral interview questions

##### Exercise: Interviewing Role Play

- Each class member will conduct a candidate interview with scoring
- Re-cap: What worked - what did not?

#### Day 2

##### People/Team Leader (Role #2)

- The Performance Management Process
- Setting team goals and expectations
- Exercise: Establishing "Key Success Criteria"

##### Communicating with 4 Generations

- Analyze needs of four generations
- Craft messages to reach each generation

##### Performance Management

- Creating team and individual objectives
- Creating employee developmental plans
- Exercise: Completing the "Performance Management" File
- Differentiating development plans and career plans: The Managers Role in each

##### Apply Powers of a Manager

- Compensation
- Promotions
- Counseling and Discipline

##### Exercise: Leading Top / Standard / and Marginal Performers



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#### Assignment #3

- Simulate week #4
- Update Score Card

#### Performance Appraisal Process

- Documenting Employee Performance
- Exercise: The Documentation Log
- Exercise: Completing a written Performance Appraisal for one simulated employee
- Recognizing Top, Solid and Marginal Performers

#### Exercise

#### Assignment #4

- Simulate week #5

#### Manager's Update

- Discussion: Critical issues to consider when presenting a Management Update
- Each team makes a 5-7 minute presentation
- Page 1: Key Success Criteria Results
- Page 2: Score Card Results
- Page 3: Answer Strategy Questions

### Day 3

#### Assignment #5 and #6

- Update Hiring Strategy to include ongoing and project work
- Simulate weeks #6 and #7
- Update "Actual" Performance on Gantt Chart

#### Human Resources and Legal Issues (Role #3)

#### Legal Issues

- EEO
- Affirmative Action
- Fair Labor Standards Act
- Americans with Disabilities Act (ADA)
- Sexual Harassment
- Family and Medical Leave Act (FMLA)

#### Human Resource Policies

- Flexible Work Schedules
- Compensation/OT
- Discipline
- Absenteeism
- Alcohol and Drug Abuse

#### Environmental Health and Safety

- Do you provide your employees with a workplace that is Healthy and Safe?

#### Exercise: Each Team Outlines the Major Components of an Assigned Law or Policy

- A law that effects the workplace
- A Human Resource Policy

#### Strategic-Decision Maker (Role #4)

- Proactive vs. Reactive
- Sets Priorities
- Problem Solving
- Decision-Making
- Balances Long Term Strategies with Short Term Tactics
- Exercise: Identify cost reduction opportunities for your simulated team

#### Assignment #7

- Continue with the simulation: Weeks #8 and #9

#### Final Presentations\*

- 10 minute presentation per team
- All team members participate
- Allow time for Q & A
- Introduce Team Members, Motto and Logo
- Present Score Card results
- Present Key Success Criteria results
- Present Project results
- Address Lessons Learned from the simulation and identify specific changes you will implement back on the job
- Course Evaluation and Wrap-Up

#### Applications

- Identify tools for application
- Implement customized process

\*Option: Final team presentations may be given to an invited group of Senior Company/Division Business Leaders. Presentations would be followed by a question and answer period.

