

COURSE WORKBOOK



CMI LEVEL 7 Strategic Management and Leadership

Facilitators:
Ian "Ren" Rennie

CONTENTS

DAY ONE

Being Strategic: Planning, Implementation and Monitoring

DAY TWO

Mindset and Models for Effective Leaders and Managers

DAY THREE

Mastering the Skillset of Managers and Leaders

DAY FOUR

Organisational Design, Wellbeing, and Identity

DAY FIVE

Personal Development as a Leader and Manager

INTRODUCTION TO WORKBOOK

This workbook is designed to complement the material discussed on the CMI Level 7 Management and Leadership programme. It is not a comprehensive reflection of the material that will be shared ... that complete set of material will be provided following the programme.

This workbook does contain some thought pieces that will be discussed, space for you to record notes, reflections and actions, and one or two instruments that will be used during the programme.

DAY ONE – STRATEGY

“Strategic thinking ... is about synthesis. It involves intuition and creativity. The outcome of strategic thinking is an integrated perspective of the enterprise”

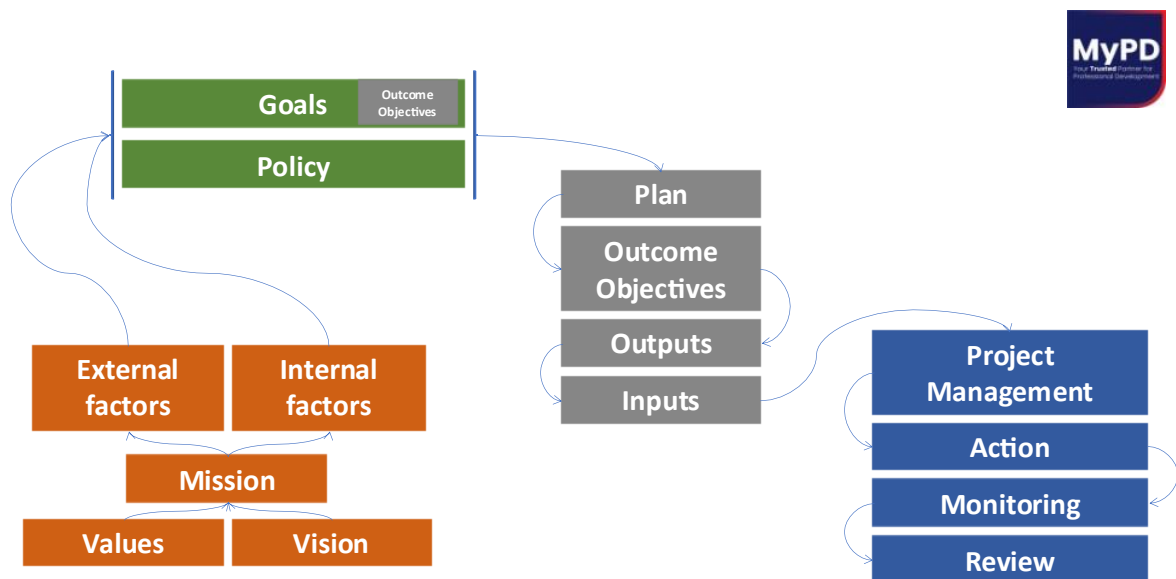
- Henry Mintzberg

“In strategy it is important to see distant things as if they were close and to take a distanced view of close things”

- Miyamoto Musashi

“Strategic thinking is simply an intentional and rational thought process that focuses on the analysis of critical factors and variables that will influence the long-term success of a business, a team, or an individual

- Center for Management and Organizational Effectiveness.



© MyPD 2022

A persuasive strategy demonstrates that risk has been properly considered.

This means:

- risks considered
- risks prioritised
- existing and planned mitigation
- risk governance arrangements.

Translating strategy aims into actionable processes in an ordered fashion is not easy.

The setting of priorities and the development of plans may present organisations with formidable challenges.

The effective execution of strategy can be impeded by:

- weak or inconsistent senior-level commitment
- a lack of buy-in from managers and employees
- cross-team conflicts
- role or responsibility ambiguity
- lack of accountability.



Communication strategy planning

Strategic Objective					
Strategic Context					
Target Audience(s)....	Communication Objective....	Creative Concepts			Messenger....
		Messages ...	Tools ...	Channels	
Risk Analysis					
Metrics and Evaluation					

© MyPD 2022

Metrics (for monitoring and evaluation)



© MyPD 2022

What have I learned / what is new to me?

What was most applicable to me?

What actions do I have consequently?

DAY TWO – LEADERSHIP EXPLORED

Myths about leadership:

- It's rare
- It's found mainly at the top
- It's about being super-human
- You can only do it if you are male!

Current view?



- According to McKinsey on August 16, 2022:
- “There’s a big difference between being a boss and being a leader
- Bosses command, assign tasks, discipline, and assert authority
- Leaders influence, inspire, mentor, and *delegate* authority
- To lead effectively, you must routinely assess the way you think, act, and affect others.”

<https://www.mckinsey.com/featured-insights/mckinseyguide-to-managingyourself/learn-to-lead?cid=otheremail:mck&hjid=cd-c78-9cfc634a8693c94ca8ff2ce6e8hctky=1850588&hbid=dd0ef98045c8a601a40c6dcd50b>

© MyPD 2022

Competence – CMI Professional Standard



Organisational Performance

Leading Change and Innovation
Managing Resource and Risk
Achieving Results



03

Ethical and
inclusive
leadership

01

Personal Effectiveness

Managing Yourself
Making Decisions
Communicating and Influencing

Interpersonal Excellence

Providing Purpose and Direction
Developing People & Capabilities
Building Relationships & Networks

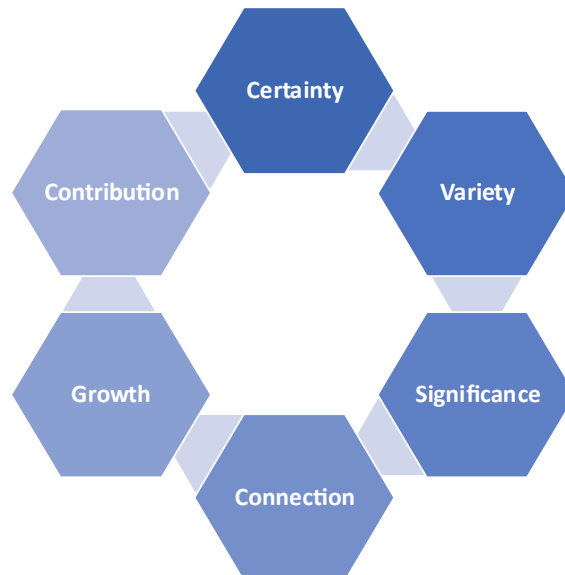


<https://www.managers.org.uk/education/learn-in-a-professional-standard/a-professional-standard/>

© MyPD 2022

6 Human Needs

- Freud
- Maslow
- Robbins.



© MyPD 2022



Exercise

1. Belief in the company/product/service
2. Camaraderie, peer motivation
3. Feeling encouraged and recognised
4. Growing professionally
5. Having a real impact
6. Intrinsic desire to a good job
7. Meeting client/customer needs
8. Money and benefits
9. Positive supervisor/senior management
10. Other.

Pick the one that
closest represents
your top motivator.

Set a very high bar
for choosing “Other”.

© MyPD 2022

What have I learned / what is new to me?

What was most applicable to me?

What actions do I have consequently?

DAY THREE – THE SKILLSET

Glossophobia, or a fear of public speaking, is a very common phobia and one that is believed to affect up to 75% of the population. When asked to rank out of 10 how scared they were by a list of a fear of public speaking was found to be a more pressing concern than death. Only the loss of a family member was deemed a more terrifying thought.

Public Speaking – a process



Purpose



Plan



Practise

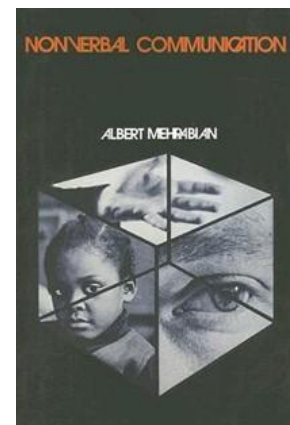
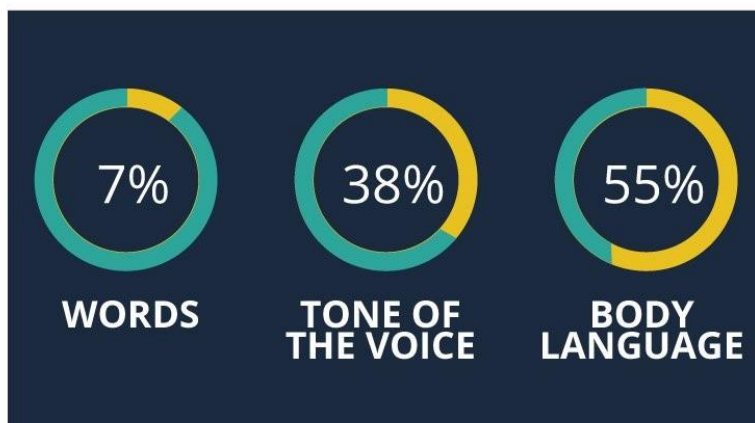


Present

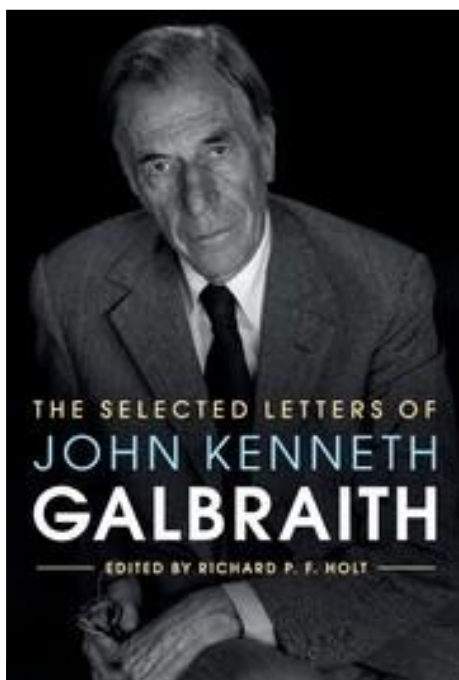


© MyPD2022

Albert Mehrabian



© MyPD2022



John Kenneth Galbraith

“Faced with the choice between changing one’s mind and proving that there is no need to do so almost everybody gets busy on the proof.”

© MyPD 2022

Mentoring is a relationship in which a more experienced colleague shares their greater knowledge to support the development of a less experienced person

Coaching assists an individual to bridge the gap between where they are now, to where they would like to be, far more effectively than if they worked alone.

Common Challenges to Remote / Distance Working



- Lack of face-to-face supervision
- Lack of access to information
- Social isolation
- Distractions at home.

<https://hbr.org/2020/03/a-guide-to-managing-your-newly-remote-workers>



© MyPD 2022



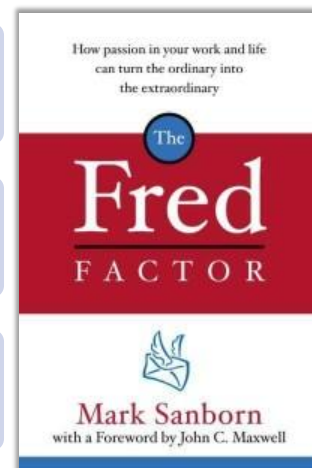
"In teamwork ...



silence isn't golden ...



it's deadly".



© MyPD 2022

What have I learned / what is new to me?

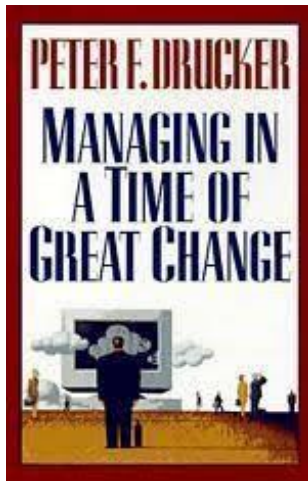
What was most applicable to me?

What actions do I have consequently?

DAY FOUR – CULTURE

Organisational design:

- is a review of what an organisation wants and needs
- an analysis of the gap between its current state and where it wants to be in future
- the design of organisational practices that will bridge that gap.



Is culture important?

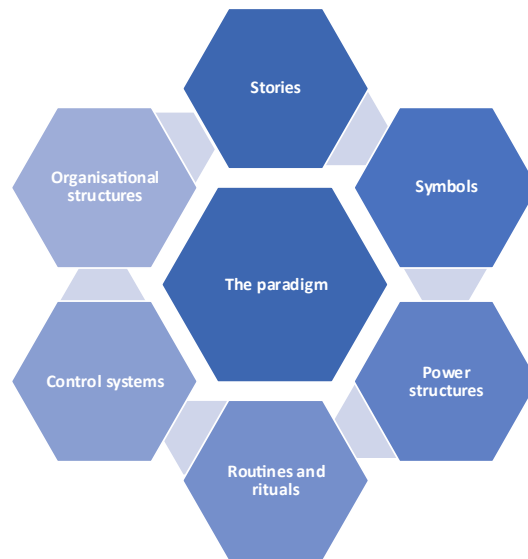
- According to Peter Drucker:
- “Culture eats strategy for breakfast”.



© MyPD 2022

Organisational culture is an organisation’s value system and its collection of guiding principles, reflected in management policies and actions and strongly influenced by the leadership.

The Culture Web



Developed by **Gerry Johnson and Kevan Scholes** in 1992

© MyPD 2022

Planning for Strategic Change: 10 factors



© MyPD 2022

Wellbeing

- Deloitte, estimated that even before the pandemic, poor mental health was costing UK employers £45 billion each year
- And that for every £1 spent on mental health interventions ...
- Employers gain £5 in
 - reduced absence
 - presenteeism
 - employee turnover.



<https://www2.deloitte.com/uk/en/pages/press-releases/articles/poor-mental-health-costs-uk-employers-up-to-pound-45-billion-a-year.html>



© MyPD 2022

A workplace encouraging equality, diversity and inclusion can help:

- make it more successful
- keep employees happy and motivated
- prevent serious or legal issues arising, such as bullying, harassment and discrimination
- better serve a diverse range of customers
- improve ideas and problem-solving
- attract and retain good people.

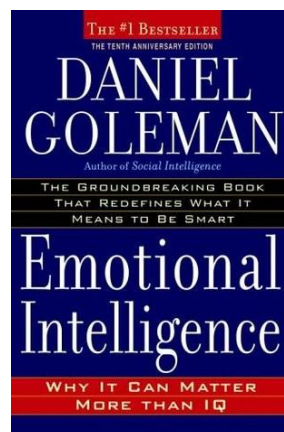
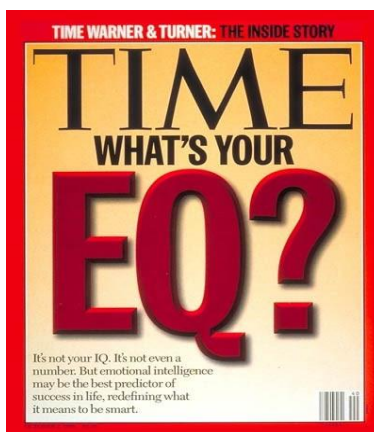
What have I learned / what is new to me?

What was most applicable to me?

What actions do I have consequently?

DAY FIVE – PERSONAL DEVELOPMENT

Emotional intelligence



© MyPD 2022

Emotional Intelligence is the ability to recognise and understand emotions in yourself and others and the ability to use this awareness to manage your behaviour and relationships.



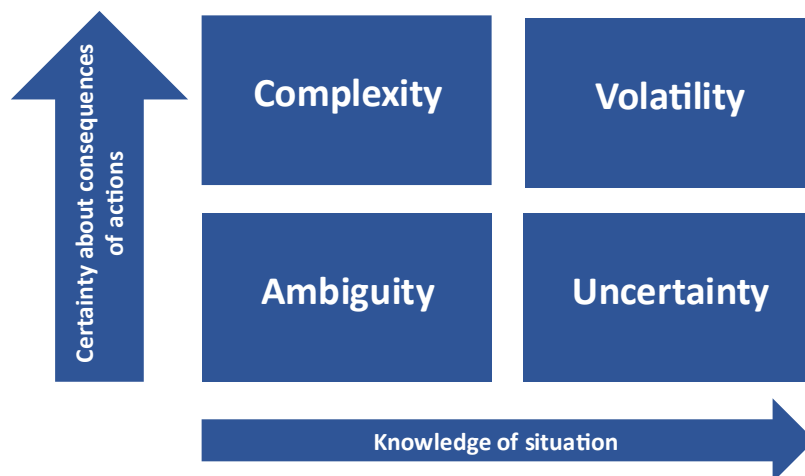
The pace of change

- The pace of change has accelerated
- Change is disruptive
- More than ever an organisation's ability to adapt to change is key to success
- And the future is hard to predict!

© MyPD 2022



Long range planning challenges?



© MyPD 2022



Three Layers of Resilience:

Individual Resilience

- Individual coping skills
- Innate resilience
- Learned resilience

Interpersonal / Team Resilience

- Team relationships
- Social Support
- Mentoring / sharing ideas / supervision

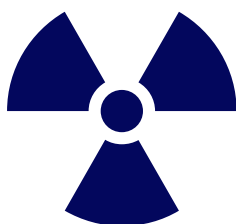
Organisation Resilience

- Strategic leadership
- Creating learning opportunities and development from mistakes.

© MyPD 2022



High Resilient Organisations



- Resilient organisations are prepared for adversity
- Also proactive and flexible when it occurs
- HROs are considered best practise examples.

© MyPD 2022

Personal action plans components



Understand yourself

Set priority goals

Make them measurable

Gap analysis

Identify steps

Plan and execute

Measure and review.

© MyPD2022

What have I learned / what is new to me?

What was most applicable to me?

What actions do I have consequently?

ANNEX A – THOMAS-KILMAN CONFLICT MODE INSTRUMENT

INSTRUCTIONS

Consider situations in which you find your wishes differing from those of another person. How do you usually respond to such situations?

Below and on the following pages are several pairs of statements describing possible behavioural responses. For each pair, please indicate the 'A' or 'B' statement that is most characteristic of your own behaviour.

In many cases, neither the 'A' nor 'B' statement may be very typical of your behaviour; but please select the response that you would be more likely to use.

	A	B	A or B
1	There are times when I let others take responsibility for solving the problem.	Rather than negotiate the things, on which we disagree, I try to stress those things upon which we both agree.	
2	I try to find a compromise solution.	I attempt to deal with all of the other person's and my concerns.	
3	I am usually firm in pursuing my goals.	I might try to soothe the other's feelings and preserve our relationship.	
4	I try to find a compromise solution.	I sometimes sacrifice my own wishes for the wishes of the other person.	
5	I consistently seek the other's help in working out a solution.	I try to do what is necessary to avoid useless tensions.	
6	I try to avoid creating unpleasantness for myself.	I try to win my position.	
7	I try to postpone the issue until I have had some time to think it over.	I give up some points in exchange for others.	
8	I am usually firm in pursuing my goals.	I attempt to get all concerns and issues immediately out in the open.	

9	I feel that differences are not always worth worrying about.	I make some effort to get my way.	
10	I am firm in pursuing my goals.	I try to find a compromise solution.	
11	I attempt to get all concerns and issues immediately out in the open.	I might try to soothe the other's feelings and preserve our relationship.	
12	I sometimes avoid taking positions that would create controversy.	I will let the other person have some positions if he/she lets me have some of mine.	
13	I propose a middle ground.	I press to get my points made.	
14	I tell the other person my ideas and ask for his/hers.	I try to show the other person the logic and benefits of my position.	
15	I might try to soothe the other's feelings and preserve our relationship.	I try to do what is necessary to avoid tensions.	
16	I try not to hurt the other's feelings.	I try to convince the other person of the merits of my position.	
17	I am usually firm in pursuing my goals.	I try to do what is necessary to avoid useless tensions.	
18	If it makes the other person happy, I might let him/her maintain his/her views.	I will let the other person have some of his/her positions if he/she lets me have some of mine.	
19	I attempt to get all concerns and issues immediately out in the open.	I try to postpone the issue until I have had some time to think it over.	
20	I attempt to work through our differences immediately.	I try to find a fair combination of gains and losses for both of us.	
21	In approaching negotiations, I try to be considerate of the other person's wishes.	I always lean toward a direct discussion of the problem.	
22	I try to find a position that is intermediate between the other person's and mine.	I assert my wishes.	
23	I am very often concerned with satisfying all our wishes.	There are times when I let others take responsibility for solving the problem.	

24	If the other's position seems very important to him/her, I would try to meet his/her wishes.	I try to get the other person to settle for a compromise.	
25	I try to show the other person the logic and benefits of my position.	In approaching negotiations, I try to be considerate of the other person's wishes.	
26	I propose a middle ground.	I am nearly always concerned with satisfying all our wishes.	
27	I sometimes avoid taking positions that would create controversy.	If it makes the other person happy, I might let him/her maintain his/her views.	
28	I am usually firm in pursuing my goals.	I usually seek the other's help in working out a solution.	
29	I propose a middle ground.	I feel that differences are not always worth worrying about.	
30	I try not to hurt the other's feelings	I always share the problem with the other person so that we can work it out.	

ANNEX B– (EI) Emotional intelligence questionnaire

This self-assessment questionnaire is designed to get you thinking about the various competences of emotional intelligence as they apply to you.

Daniel Goleman first brought 'emotional intelligence' to a wide audience with his 1995 book of that name. He found that while the qualities traditionally associated with leadership such as intelligence, toughness, determination and vision are required for success, they are insufficient. Truly effective leaders are also distinguished by a high degree of emotional intelligence, which includes:

- Self-awareness

The ability to recognise what you are feeling, to understand your habitual emotional responses to events and to recognise how your emotions affect your behaviour and performance. When you are self-aware, you see yourself as others see you, and have a good sense of your own abilities and current limitations.

- Managing emotions

The ability to stay focused and think clearly even when experiencing powerful emotions. Being able to manage your own emotional state is essential for taking responsibility for your actions, and can save you from hasty decisions that you later regret.

- Motivating oneself

The ability to use your deepest emotions to move and guide you towards your goals. This ability enables you to take the initiative and to persevere in the face of obstacles and setbacks.

- Empathy

The ability to sense, understand and respond to what other people are feeling. Self-awareness is essential to having empathy with others. If you are not aware of your own emotions, you will not be able to read the emotions of others.

- Social Skill

The ability to manage, influence and inspire emotions in others. Being able to handle emotions in relationships and being able to influence and inspire others are essential foundation skills for successful teamwork and leadership.

What to do

Assess and score each of the questionnaire's statements.

Score your assessment, using a scale where:

1 indicates that the statement does NOT apply at all

3 indicates that the statement applies about half the time

5 indicates that the statement ALWAYS applies to you

Transfer your scores to the calculation table and total your results.

Remember, this tool is not a validated psychometric test – the answers you give are likely to vary depending on your mood when you take it.

Consider your results and identify one or two actions you can take immediately to strengthen your emotional intelligence.

Assess and score how much each statement applies to you

	How much does each statement apply to you?	Circle your score.				
	Score yourself 1 to 5 based on the following guide. 1 = Does not apply ~ 3 = Applies half the time ~ 5 = Always applies					
1	I realise immediately when I lose my temper	1	2	3	4	5
2	I can 'reframe' bad situations quickly	1	2	3	4	5
3	I am able to always motive myself to do difficult tasks	1	2	3	4	5
4	I am always able to see things from the other person's viewpoint	1	2	3	4	5
5	I am an excellent listener	1	2	3	4	5
6	I know when I am happy	1	2	3	4	5
7	I do not wear my 'heart on my sleeve'	1	2	3	4	5
8	I am usually able to prioritise important activities at work and get on with them	1	2	3	4	5
9	I am excellent at empathising with someone else's problem	1	2	3	4	5
10	I never interrupt other people's conversations	1	2	3	4	5
11	I usually recognise when I am stressed	1	2	3	4	5
12	Others can rarely tell what kind of mood I am in	1	2	3	4	5
13	I always meet deadlines	1	2	3	4	5
14	I can tell if someone is not happy with me	1	2	3	4	5
15	I am good at adapting and mixing with a variety of people	1	2	3	4	5
16	When I am being 'emotional' I am aware of this	1	2	3	4	5
17	I rarely 'fly off the handle' at other people	1	2	3	4	5
18	I never waste time	1	2	3	4	5
19	I can tell if a team of people are not getting along with each other	1	2	3	4	5

20	People are the most interesting thing in life for me	1	2	3	4	5
21	When I feel anxious, I usually can account for the reason(s)	1	2	3	4	5
22	Difficult people do not annoy me	1	2	3	4	5
23	I do not prevaricate	1	2	3	4	5
24	I can usually understand why people are being difficult towards me	1	2	3	4	5
25	I love to meet new people and get to know what makes them 'tick'	1	2	3	4	5
26	I always know when I'm being unreasonable	1	2	3	4	5
27	I can consciously alter my frame of mind or mood	1	2	3	4	5
28	I believe you should do the difficult things first	1	2	3	4	5
29	Other individuals are not 'difficult' just 'different'	1	2	3	4	5
30	I need a variety of work colleagues to make my job interesting	1	2	3	4	5
31	Awareness of my own emotions is very important to me at all times	1	2	3	4	5
32	I do not let stressful situations or people affect me once I have left work	1	2	3	4	5
33	Delayed gratification is a virtue that I hold to	1	2	3	4	5
34	I can understand if I am being unreasonable	1	2	3	4	5
35	I like to ask questions to find out what it is important to people	1	2	3	4	5
36	I can tell if someone has upset or annoyed me	1	2	3	4	5
37	I rarely worry about work or life in general	1	2	3	4	5
38	I believe in 'Action this Day'	1	2	3	4	5
39	I can understand why my actions sometimes offend others	1	2	3	4	5

40	I see working with difficult people as simply a challenge to win them over	1	2	3	4	5
41	I can let anger 'go' quickly so that it no longer affects me	1	2	3	4	5
42	I can suppress my emotions when I need to	1	2	3	4	5
43	I can always motivate myself even when I feel low	1	2	3	4	5
44	I can sometimes see things from others' point of view	1	2	3	4	5
45	I am good at reconciling differences with other people	1	2	3	4	5
46	I know what makes me happy	1	2	3	4	5
47	Others often do not know how I am feeling about things	1	2	3	4	5
48	Motivations have been the key to my success	1	2	3	4	5
49	Reasons for disagreements are always clear to me	1	2	3	4	5
50	I generally build solid relationships with those I work with	1	2	3	4	5

Total and interpret your results

Record your 1, 2, 3, 4, 5 scores for the questionnaire statements in the grid below. The grid organises the statements into emotional competency lists.

Self awareness		Managing emotions		Motivating oneself		Empathy		Social Skill	
1		2		3		4		5	
6		7		8		9		10	
11		12		13		14		15	
16		17		18		19		20	
21		22		23		24		25	
26		27		28		29		30	
31		32		33		34		35	
36		37		38		39		40	
41		42		43		44		45	
46		47		48		49		50	

Calculate a total for each of the 5 emotional competencies.

Total = (SA)		Total = (ME)		Total = (MO)		Total = (E)		Total = (SS)	
--------------------	--	--------------------	--	--------------------	--	-------------------	--	--------------------	--

Interpret your totals for each area of competency using the following guide.

35–50 This area is a **strength** for you.

18–34 **Giving attention** to where you feel you are weakest will pay dividends.

10–17 Make this area a **development priority**.

Consider your results and identify one or two actions you can take immediately to strengthen your emotional intelligence.