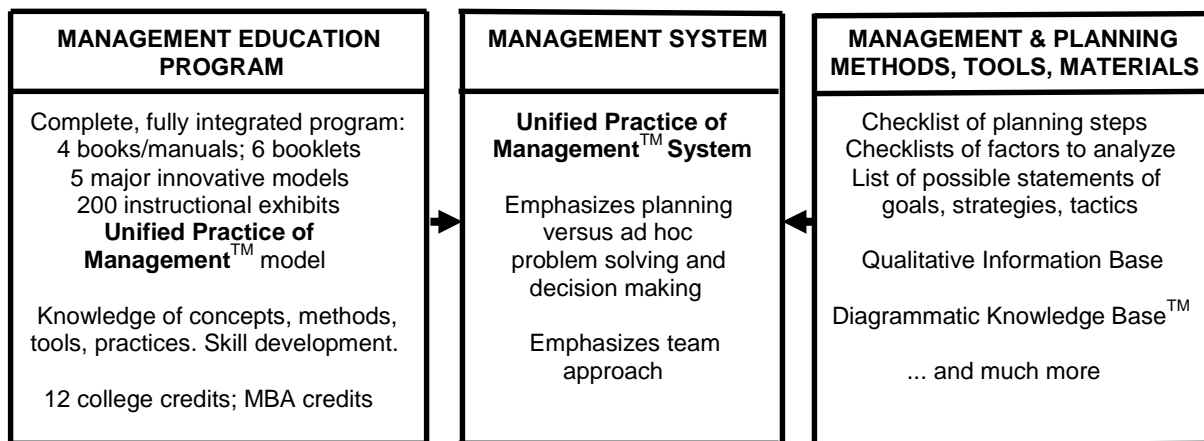# MANAGEMENT TOOLBOX

(Advanced Methods and Tools Developed for Consultant and Client Use)

- **Integrated Management Systems**

- **Management, Leadership, and Organization Development**

- **Marketing and Strategic Planning**
- **Finance and Operations**

- **Knowledge Management**

- **Team Thinking and Learning Centers**

INTEGRATED MANAGEMENT SYSTEMS

MANAGEMENT EDUCATION PROGRAM	MANAGEMENT SYSTEM	MANAGEMENT & PLANNING METHODS, TOOLS, MATERIALS
Complete, fully integrated program: 4 books/manuals; 6 booklets 5 major innovative models 200 instructional exhibits **Unified Practice of Management**™ model Knowledge of concepts, methods, tools, practices. Skill development. 12 college credits; MBA credits	**Unified Practice of Management**™ **System** Emphasizes planning versus ad hoc problem solving and decision making Emphasizes team approach	Checklist of planning steps Checklists of factors to analyze List of possible statements of goals, strategies, tactics Qualitative Information Base Diagrammatic Knowledge Base™ ... and much more

- Improve individual and team performance of management functions by 50% to 100%.
- Improve team (boss-subordinate, intra-unit, and inter-unit) relationships by as much as 100%.

- Reduce operational problems and conflicts by 20% or more.
- Help managers save at least 20% of their time.

- Enable managers to deal with 50 to 100 times more strategic information.
- Help managers identify more opportunities, threats, and problems—and sooner, not later.

This system is a **state-of-the-art integration** of several innovative knowledge management tools and practices, learning organization practices, general management concepts and practices, and management and organization development practices—all within a strategic planning context. Some consultants' methods, tools, and materials have been computerized for greater "do-it-yourself management."

Most of the following tools are not licensed outright. We generally license them for a client's continued use prior to the consulting engagement during which they will first be utilized on a facilitated basis.

The checklist tools mentioned below are used to perform very detailed **"zero-base systems analyses"** (**ZBSAs**)—i.e., **"from scratch" and more improvement- than problem-oriented analyses**—within the context of a strategic planning process. Their use results in the development of both qualitative and diagrammatic knowledge bases, which we firmly believe help maximize organizational learning (like a **"learning organization on steroids"**). The development, use, and benefits of these strategic planning knowledge bases are described in *Next-Generation Management, Leadership & Organization Development*.

As team participants fill in these checklists during a facilitated strategic analysis and planning process, they are essentially harvesting *tacit information* from their minds (e.g., observations, insights, conclusions, opinions, etc.) into an easily searchable, spreadsheet-oriented "qualitative information base" (QIB).

MANAGEMENT AND ORGANIZATION DEVELOPMENT

The methods and tools listed below help guide an organization through a (diagrammatic) analysis of how numerous internal/organizational and external factors are interacting with and upon each other, and, as a result, are influencing motivation, attitudes, interactions, task behavior, and performance within **all major levels and groups** of an organization. This process is exceptionally powerful and beneficial.

1. 74-page **Index** (6-level spreadsheet outline/checklist) **of Major Socio-Technical/Cultural Factors** that influence motivation, attitudes, behavior, interactions, and performance within an organization. This index is essentialy an organizational behavior taxonomy or a Dewey Decimal System type of categorization of socio-technical or cultural factors. It is like having an **"organizational behavior expert on a disk."** When filled in during a strategic planning (zero-base systems) analysis, it constitutes an "**Organizational Behavior Qualitative Information Base**" of mostly tacit information.

2. A **methodology** for (using the checklist and) **diagramming the analysis of organizational systems, structures, and attitudinal and behavioral phenomena.** Like Systems Analysis approaches, this wall-size diagram depicts structures and flows of information, materials, and services (etc.). However, it also shows how socio-technical/cultural factors are influencing structures, flows, motivation, attitudes, task behavior, interdepartmental interactions, and performance all through the organization. [Once such a wall diagram is computerized, it becomes a "**diagrammatic knowledge base" or DKB**.]

3. **Various designs of a TeamThink Wall**^{TM} [diagramming surface of 160 to 256 (or more) square feet]   Several designs enable long-range analyses of internal and external systems of factors.

MARKETING AND STRATEGIC PLANNING

1. 186-page, **Index** (8-level spreadsheet outline/checklist) **of Industry, Marketplace, and Marketing Mix Factors** (a "marketing meta-construct" of approximately 3,500 variables): **industry** structure, competitors, practices – 45 pages; **products** (or **services**) – 10 pages; **consumer** demographics, attitudes, behavior – 13 pages; **distribution channels** – 16 pages; general, push, and pull **promotion** – 45 pages; **pricing** – 17 pages; and **competitive**

strengths and weaknesses checklist – 13 pages. This index is essentially a marketing taxonomy or a Dewey Decimal System type of categorization of marketplace-related factors. It is like having a **"marketing expert on a disk."** Although this checklist is primarily an analytic tool for performing very detailed "zero-base marketing (systems) analyses," it also provides a framework for developing a **"Marketing Qualitative Information Base"** of mostly tacit information harvested from participants' minds. (Sub-checklists are pictured below.)

2. 126-page **Index** (spreadsheet outline/checklist) **of External/Outside Forces and Factors** that will tend to affect an industry and/or given organization over time (a "business environment meta-construct"). Is based on our extensive files concerning (a) factors, phenomena, and trends in numerous **technological areas**; (b) phenomena, events, and trends in numerous industries; (c) **economic** factors, phenomena, data, and trends; (d) **socio-cultural** factors, phenomena, data, and trends; (e) **governmental** factors, phenomena, and trends; (f) **international** factors, phenomena, and trends; and (g) **environmental** factors, phenomena, and trends; etc. This index is essentially a business environment taxonomy or a Dewey Decimal System type of categorization of factors external to an organization. Along with the marketing checklist described above, it is used to perform very detailed "zero-base industry/marketplace/business environment systems analyses"—especially during strategic planning processes. (This checklist is pictured below at the top of the middle group.)
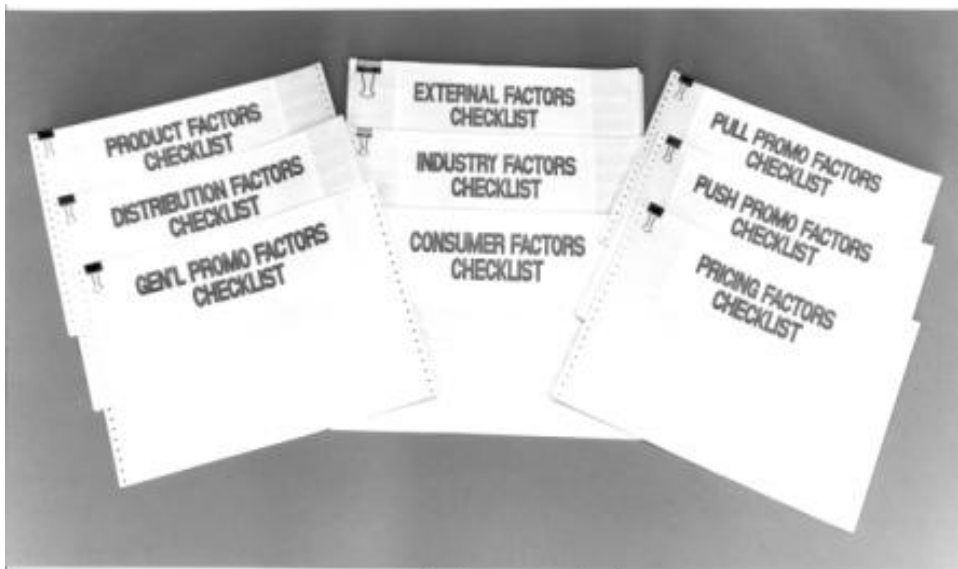
3. A **methodology** for developing a wall-size diagram of a company's entire Industry/Marketplace and Business Environment Analysis (the many factors or variables, their relationships, and associated key data). [Once such a diagram is computerized, it becomes a "**diagrammatic knowledge base**" **(DKB**).]

4. A four foot by eight foot **diagram of (projected) phenomena** occurring over the next twenty years in various areas: technologies; industries; government; the economy; the culture; etc. The model is a condensed, visual version of (a) the External Forces/Factors Checklist mentioned above, and (b) information compiled over approximately thirty years.

5. A 300-page **Planning Manual** on the analysis, goal-setting, planning, budgeting, and decision-making functions involved in strategic/long-range planning, annual planning, and (ad hoc) problem solving and decision making.

6. A (computerized) 72-page **Checklist of Strategic/Long-Range Planning Steps** (both methodo-logical and organizational steps)—a four-level outline of steps and sub-steps, tips, suggestions, and references to pages in the printed planning manual that explain "how to."

7. A (computerized) 50-page **List of Possible Statements of Objectives, Strategies, and Tactics** for a company and its major units. It enables drag-and-drop development of a goals and plans document.

8. A **methodology and a TeamThink Wall**^{TM} **design for diagramming an entire "*time-lapse industry/marketplace/business environment analysis"*** as a basis for strategic/long-range planning scenario analysis).

9. A computer **template** for "automatically" integrating program/project budgets into consolidated corporate pro forma financials. (Under development.)

10. A **method** for performing **strategic/long-range planning** using a **net present value analysis** (to evaluate alternative sets of strategies and plans/budgets of the major organizational units).

FINANCE AND PRODUCTION

- 100-page, **Index** (spreadsheet outline/checklist) **of Financial Factors** (a "meta-construct" of many financial variables): **main fInancial factors** — 64 pages; **industry financial factors** — 12 pages; **financial laws and regulations** — 6 pages; **external financial entities and forces** — 11 pages; **financial ratios** (with built-in spreadsheet calculators) — 6 pages; and (statements of) **alternative goals and objectives** — 2 pages. This index is essentially a fi-nancial taxonomy or a Dewey Decimal System type of categorization of financial variables. It is like having a **"financial expert on a disk."** Although this checklist is primarily an analytic tool for performing very detailed "zero-base financial (systems) analyses," especially during strategic planning processes, it also provides a framework for developing a "**Financial Quali-tative Information Base**" of mostly tacit information harvested from participants' minds.

- 45-page (at present), **Index** (spreadsheet outline/checklist) **of Operations/Production Fac-tors** (a "meta-construct" of many production variables): **product-related factors** — 36 pages; **competitors' facilities factors** — 2 pages; **company facilities** — 2 pages (for now); and **task-related/technological factors** — 5 pages. This index is essentially a production taxono-my or a Dewey Decimal System type of categorization of operational variables. It is like having an **"operations/production expert on a disk."** Although this checklist is primarily an analytic tool for performing very detailed "zero-base production (systems) analyses," especially during strategic planning processes, it also provides a framework for developing a "**Production Qualitative Information Base**" of mostly tacit information harvested from participants' minds.

KNOWLEDGE MANAGEMENT

1. **Marketing Qualitative Information Base**

    The computerized 186-page, 8-level **Index** (spreadsheet checklist) **of Industry, Marketplace, and Marketing Mix Factors** described above, while an analytic tool, is also a framework for developing this database of tacit (mostly qualitative or subjective) information harvested from team members' minds.

2. Marketing Diagrammatic Knowledge Base

A computerized 160 to 256+ square foot, company-specific **Industry, Marketplace, and Business Environment Diagram**—complete with pop-up maps and graphs of data associated with the diagrammed entities, variables, phenomena, and their relationships—that can serve as an interface to access data from additional sources. (Basic pre-drawn templates for the healthcare and energy/utilities industries are under development.)

3. Organizational Behavior Qualitative Information Base

The 74-page **Index of Major Socio-Technical/Cultural Factors** mentioned above, when filled in, constitutes an "Organizational Behavior Qualitative (tacit) Information Base" harvested from participants' minds

4. Organizational Behavior Diagrammatic Knowledge Base

Such a knowledge base is the result of **diagramming a checklist-assisted (zero-base) analysis of organizational systems, structures, and attitudinal and behavioral phenomena.** Like Systems Analysis approaches, this diagram depicts structures and flows of information, materials, and services (etc.). However, it also shows how socio-technical/cultural factors are influencing structures, motivation, attitudes, task behavior, intra- and inter-departmental interactions, input/output flows, and performance throughout the organization.

See PDF document: How advanced methods and tools (such as qualitative and diagrammatic knowledge bases) significantly improve managers' think-work processes

TEAM THINKING & LEARNING CENTERS

1. Various possible designs of a **TeamThink Wall^{TM}** (diagramming surface) for analysis, problem-solving, decision-making, and strategic/long-range planning purposes.

   We have been diagramming complex industries, organizations, and situations on specially constructed walls ever since 1976—years before the terms "mind mapping," "influence diagrams," "information visualization," and "information architecture" were coined. Our earliest "wall" (1976) was 160 square feet. The largest wall diagram to date was 256 square feet (32' wide by 8' to 10' high). It had hundreds and hundreds of objects on it—entities, factors/variables, their cause-effect and/or sequential relationships, and key bits of data associated with them. Such a **wall model is a visual summary and integration** of large amounts of **both** qualitative and quantitative information.

2. Developing a huge diagram on a TeamThink Wall^{TM} (pictured below) helps a group deal with the complexities of real-world situations **visually**. It enables analysts, planners, decision makers, and policy makers to handle (make sense of, interrelate, brainstorm) at least 50 to 100 times more information during think-work processes. Because the most strategically significant information is on the wall right in front of participants, and because they have helped develop everything on the diagram from scratch, they need not try to juggle it all mentally. [Remember Miller's "Magical number seven (factors mentally manageable at a time), plus or minus two."] This leaves their minds free to analyze, sequence, interrelate, and/or integrate many bits of information more easily and effectively, to be more insightful and creative, and to better recognize what's going on, why, and what to do about it. [Developing a DKB involves "information visualization architecture or design."]
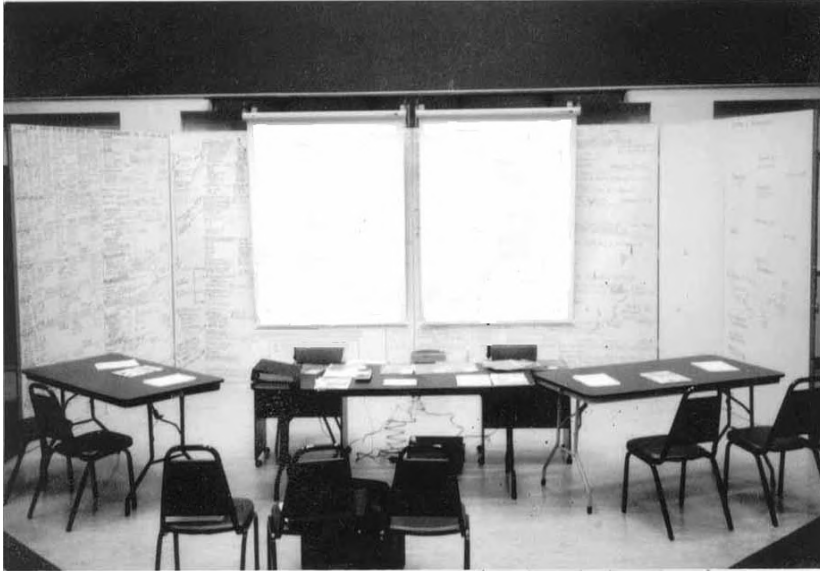
The above 256 square foot wall contains an Illinois county's 1992 Long-Range Economic Development Planning analysis. We use it because we do not make public our business client's strategic planning DKBs (diagrammatic knowledge bases).

Diagrammatic knowledge bases (DKBs) can illustrate and contain both qualitative and quantitative information regarding, for example:

a. entities and variables operating in a company's industry, marketplace, and external business environment;
b. the operational, intelligence, and logistical activities or phenomena occurring throughout an entire theater of military operations; or
c. how socio-technical/cultural factors are influencing the motivation, attitudes, behavior, activities, interactions, flows of task-related inputs and outputs, and performance both within and between organizational levels and units.

3. One design aids in performing a **"time-lapse environment-business scan"** for long-range planning purposes (i.e., for analyses of scenarios).

4. A **hardware/software system for projecting a Diagrammatic Knowledge Base** (a computerized wall diagram of, for example, either item a, b, or c above) **onto a rear projection wall**—real time, seamlessly, and in its entirety in the type of strategic planning warroom pictured above, so that it can be used and modified interactively. The rear projection wall is not just one screen or a series of monitors, but a whole "continuous wall." Using our design, a 256 square foot rear projection wall can be constructed for about $15,000 to $35,000 (depending on configuration)].

TeamThink Systems^{SM}
Division of R. D. Cecil and Company
1151 Middle Road — Suite B
Dixon, Illinois 61021-3904
Telephone: (815) 312-2571; Fax: (815) 312-2571 (call ahead)
E-mail: rdc1@rdcecil.com