# Management Tools

## Prepared by: Pulse Planning Office

**((Management in other words))**

# Index

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# Introduction

Management Tools can be defined as an entity of instruments to support implementation of concepts and ideas at all levels of conceptualization and realization of concepts, ultimately aiming to support organizational processes. *(Ref: Priority of Management Tools Utilization among Managers: International Comparison)*

Also define as every mean through which a management technique is conveyed in the organization with the mean of rationalizing at least one aspect of its functioning. *(Ref: Management Tools: From Complexity Reduction to Complexity Creation)*

So, they are the tools that are used by the management to help it make appropriate management decisions at the right time and that help the management to plan, analyze, monitor and make decisions.

The management tools are used according to the type of action taken to simplify an idea, find a solution or search for reasons, or change situations, goals and other reasons,

Upon our review of the literature, we found that there are a large number of tools that have been created then developed by time and gained a different title. Some tools are still stand with a common use. Whereas these tools must be used in the correct place to give you the ultimate benefit and desired result.

Upon reviewing we encountered many tools that are not used properly.

In this file we have tried to collect some of the most used management tools. Which includes 18 Management Tools, as we will leave you, dear reader, to choose from them which to use according to your business needs.

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**Peter Drucker (1909 - 2005 AD)** "

is an American
management consultant,
commentator, and author,
born in Austria.
He created the concept known
as management by objective and
self-control and has been described as
"the founder of modern management."

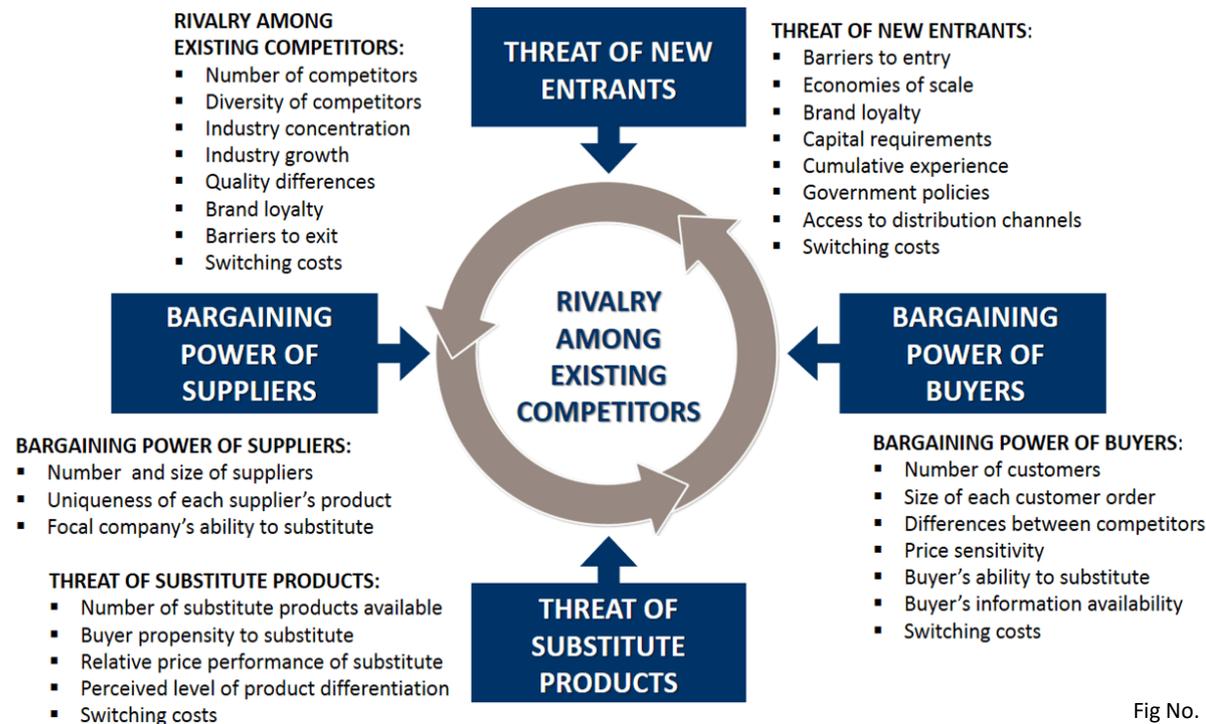| Field of use | Tool | Creator | Year | Description |
|---|---|---|---|---|
| Business Life Cycle | Porters 5 Forces | Michael Porter<br><br>(American academic) | 1979 | Porter's Five Forces is an older strategy execution framework built around the forces that impact the profitability of an industry or a market. The five forces it examines are:<br>1. The threat of entry. Could other companies enter the marketplace easily, or are there numerous entry barriers they would have to overcome?<br>2. The threat of substitute products or services. Can buyers easily replace your product with another?<br>3. The bargaining power of customers. Could individual buyers put pressure on your organization to, say, lower costs?<br>4. The bargaining power of suppliers. Could large retailers put pressure on your organization to drive down the cost?<br>The competitive rivalry among existing firms. Are your current competitors poised for major growth? If one launches a new product or files a new patent—could that impact your company? |



Fig No. 1 – Porters 5 Forces

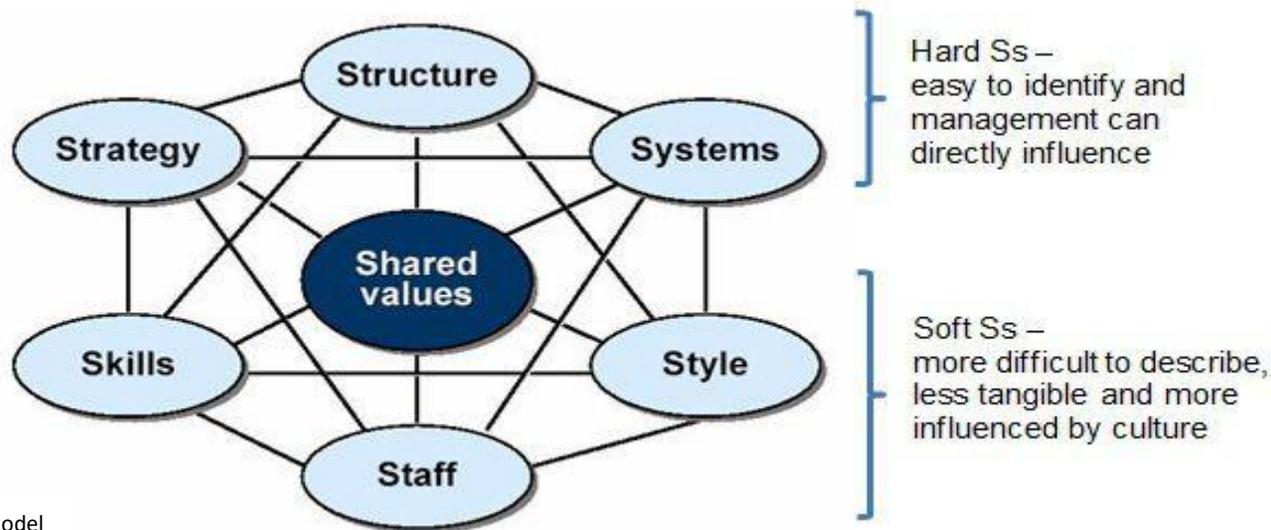| Field of use | Tool | Creator | Year | Description |
|---|---|---|---|---|
| Change Management & Strategic Planning | McKinsey's 7s Model | Tom Peters & Robert Waterman Former Consultant at Mckinsy Company | 1970 | McKinsey and Co's 7S model is a useful strategic analysis framework for:<br><br>• Assessing internal strategic alignment, and<br>• Analyzing the strengths and weaknesses of an organization.<br><br>The 7Ses divide into two categories:<br>• **The "hardware" of success, includes:**<br>  • Strategy<br>  • Structure<br>  • Systems<br>• **The "software" of success, includes:**<br>  • Style<br>  • Staff<br>  • Skills<br>  • Shared values<br>Companies in which these elements are present and aligned are usually more successful at executing strategy. |



Fig No. 2 – McKinsey's 7s Model

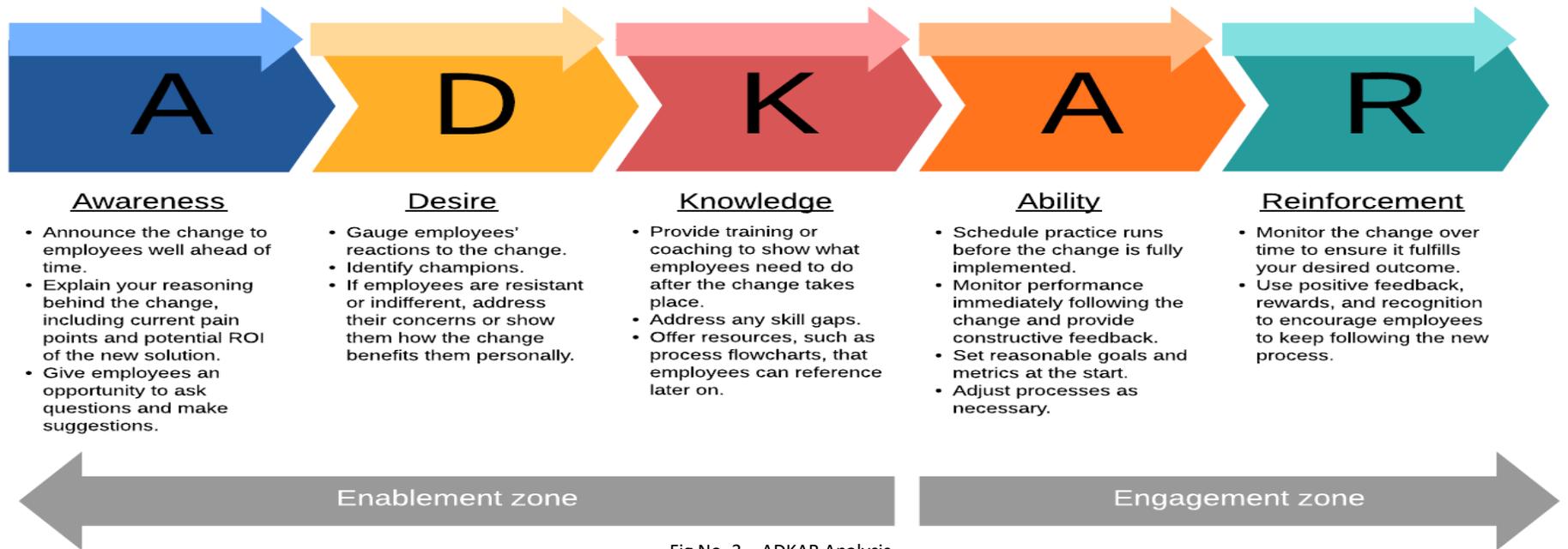| Field of use | Tool | Creator | Year | Description |
|---|---|---|---|---|
| Change Management | ADKAR Analysis | Prosci | 1998 | The Prosci ADKAR® Model is a goal-oriented change management model that guides individual and organizational change.<br>It is used as a coaching tool to make sure that the people or employees involved in the process support and believe in the change<br>ADKAR is an acronym that represents the five tangible and concrete outcomes that people need to achieve for lasting change:<br>- *Awareness*<br>- *Desire*<br>- *Knowledge*<br>- *Ability*<br>- *Reinforcement*.<br>By outlining the goals and outcomes of successful change, the ADKAR Model is an effective tool for planning change management activities, equipping your leaders facilitating change, and supporting your employees throughout the change. |



**Awareness**
- Announce the change to employees well ahead of time.
- Explain your reasoning behind the change, including current pain points and potential ROI of the new solution.
- Give employees an opportunity to ask questions and make suggestions.

**Desire**
- Gauge employees' reactions to the change.
- Identify champions.
- If employees are resistant or indifferent, address their concerns or show them how the change benefits them personally.

**Knowledge**
- Provide training or coaching to show what employees need to do after the change takes place.
- Address any skill gaps.
- Offer resources, such as process flowcharts, that employees can reference later on.

**Ability**
- Schedule practice runs before the change is fully implemented.
- Monitor performance immediately following the change and provide constructive feedback.
- Set reasonable goals and metrics at the start.
- Adjust processes as necessary.

**Reinforcement**
- Monitor the change over time to ensure it fulfills your desired outcome.
- Use positive feedback, rewards, and recognition to encourage employees to keep following the new process.

Enablement zone

Engagement zone

Fig No. 3 – ADKAR Analysis

| Field of use | Tool | Creator | Year | Description |
|---|---|---|---|---|
| Change Management | Lewin's Model of Change | Kurt Lewin (German American Social Psychologist) | 1940 | Unfreeze-Change-Re-freeze<br>　1- Unfreezing<br>This is the stage of preparation. Before any change can be implemented, you need to spread awareness as to why it is necessary. Everything from processes to organizational structures should be examined and shown to the employees at this stage. The more they are aware, the more they'll be urged to welcome the change.<br>　2- Changing<br>This is the stage where real change occurs. Employees will learn new behaviors, processes, and ways of thinking during this time.<br>　3- Refreezing<br>**It's time to solidify the new behavior, processes, goals etc. You must make sure that the change implemented is not lost and is incorporated into the culture of your organization.** |

**Unfreeze**

1. Recognize the need for change
2. Determine what needs to change
3. Encourage the replacement of old behaviors and attitudes
4. Ensure there is strong support from management
5. Manage and understand the doubts and concerns

**Change**

1. Plan the changes
2. Implement the changes
3. Help employees to learn new concept or points of view

**Refreeze**

1. Changes are reinforced and stabilized
2. Integrate changes into the normal way of doing things
3. Develop ways to sustain the change
4. Celebrate success
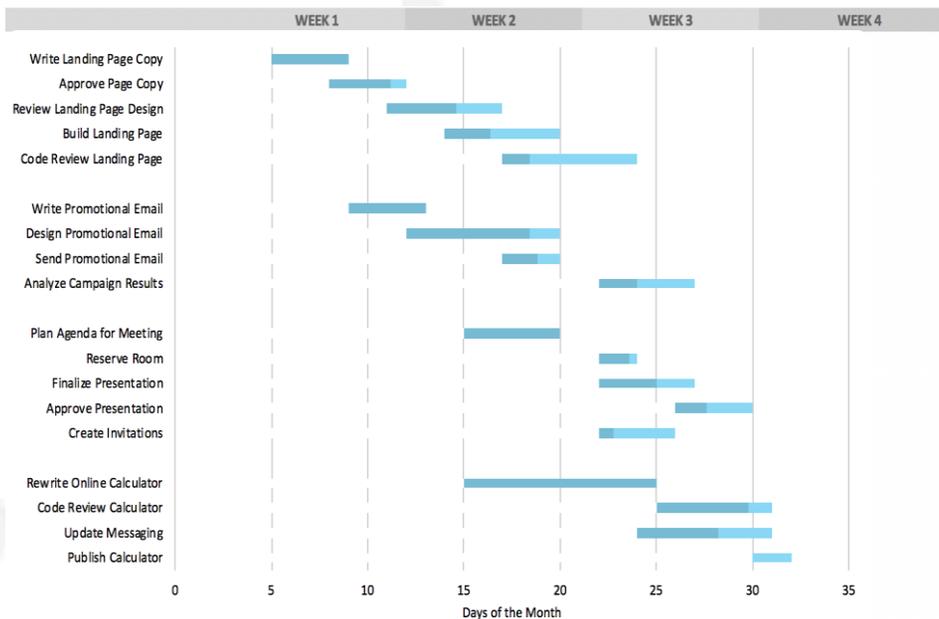
Fig No. 4 – Lewin's Model

**Henri Fayol (1841–1925)**

was a French mining engineer,
mining executive, author and
director of mines who developed
a general theory of business
administration that is often called Fayolism.
He and his colleagues developed
this theory independently of
scientific management.
He documented his theory and
experience in his book:
(Industrial and General Administration) in 1916

| Field of use | Tool | Creator | Year | Description |
|---|---|---|---|---|
| Project Management | Gantt Chart | Henry Gantt (American engineer) | 1910 - 1915 | Any change management project includes a large number of tasks, and to complete them successfully you must make sure that they are completed on schedule. Gantt charts are a useful tool to visualize and track the tasks scheduled over a period of time. |



Fig No. 5 – Gantt Chart

| Field of use | Tool | Creator | Year | Description |
|---|---|---|---|---|
| Change Management | Kotter's Model | Dr. John Kotter. A (professor at Harvard Business School) | 1995 | Kotter's change model is an 8-step method to manage change. These steps include,<br><br>**Step1: Create a sense of urgency**<br>Creating a sense of urgency among everyone will help spark that motivation in them to embrace the change that you are about to bring about.<br>You can use a SWOT analysis to emphasize the threats and opportunities that lurk in the marketplace or the industry. Additionally, you can also use a threat vs. opportunity matrix to show how your company stakeholders will be affected by the change or lack thereof.<br><br>**Step 2: Build a guiding coalition**<br>Build a strong team made up of influential people from all statuses and expertise and who can convince others that change is necessary.<br><br>**Step 3: Form a strategic vision and initiatives**<br>Create a clear vision as to why change is necessary or as to why you are asking your employees to do something. Determine the values that are linked to the change and create a strategy to get to your vision.<br><br>**Step 4: Clearly communicate the said vision**<br>Communicate your vision frequently so that it will be embedded within everything your team does. Not only during special meetings but every chance you get, try to remind the vision to your team.<br><br>**Step 5: Enable action by removing any obstacles**<br>Identify barriers that are blocking the implementation of change. Help those who are resisting change see what's needed. Reward people to support change.<br><br>**Step 6: Generate short-term wins**<br>If your staff can see short-term wins that will motivate them. Create short-term targets so you can celebrate quick wins.<br><br>**Step 7: Build on the change**<br>If something worked, identify what went right and improve it. Set goals and continue to work on it, building momentum.<br><br>**Step 8: Make it part of the culture**<br>Make sure that any change you gain, you make it part of your culture. |

Fig No. 6 – Kotter's Model

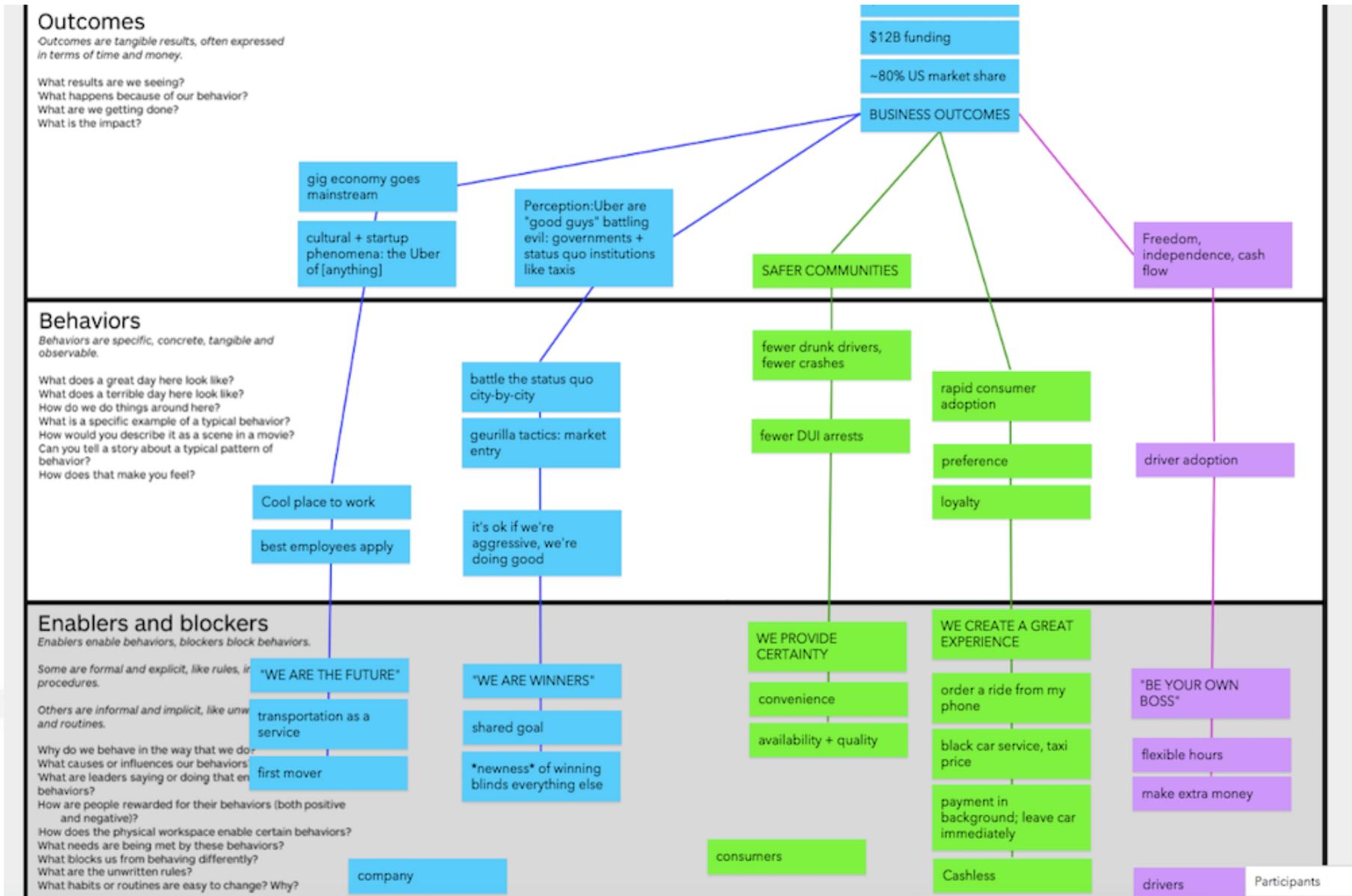| Field of use | Tool | Creator | Year | Description |
|---|---|---|---|---|
| Culture Management & Change | Culture Mapping | Dave Gray author of *The Connected Company* | | Dave developed The Culture Map as a tool to design better performing companies.<br><br>used to visualize the company culture, which is influenced by values, norms, employee behavior etc. It helps you discover information that is crucial to your change initiative, such as who are the positive enablers and how you can minimize risks during a project.<br><br>**Start by mapping behaviors:** In this box you have to map out how your team acts or conducts itself within the company. What do you do or say? How do you interact? What patterns do you notice? Some examples: "Failing to identify expert team leaders" or "respond to customer support tickets in 12 hours or less".<br><br>**Next, map your outcomes:** What is the concrete positive or negative consequences because of the behavior you've mapped out? An example: the behavior of failing to identify expert team leaders may be resulting in an outcome of "constant conflict" within your organization. In a positive situation, speedy customer support responses could result in "happy customers" within your organization.<br><br>**Finish by mapping your enablers & blockers:** This is where The Culture Map gets really interesting. In enablers and blockers, you have to map out all of the things that lead to the positive or negative behaviors inside your company. What policies, actions, or rules are influencing employee behaviors, and ultimately influencing your company's outcomes? Some examples of blockers: a poor bonus system or no budget for sticky notes. Some examples of enablers: smart management team or a well-made metrics dashboard. |

## Outcomes

*Outcomes are tangible results, often expressed in terms of time and money.*

What results are we seeing?
What happens because of our behavior?
What are we getting done?
What is the impact?

- $12B funding
- ~80% US market share
- BUSINESS OUTCOMES

- gig economy goes mainstream
- cultural + startup phenomena: the Uber of [anything]

- Perception:Uber are "good guys" battling evil: governments + status quo institutions like taxis

- SAFER COMMUNITIES

- Freedom, independence, cash flow

## Behaviors

*Behaviors are specific, concrete, tangible and observable.*

What does a great day here look like?
What does a terrible day here look like?
How do we do things around here?
What is a specific example of a typical behavior?
How would you describe it as a scene in a movie?
Can you tell a story about a typical pattern of behavior?
How does that make you feel?

- battle the status quo city-by-city
- geurilla tactics: market entry

- fewer drunk drivers, fewer crashes
- fewer DUI arrests

- rapid consumer adoption
- preference
- loyalty

- driver adoption

- Cool place to work
- best employees apply

- it's ok if we're aggressive, we're doing good

## Enablers and blockers

*Enablers enable behaviors, blockers block behaviors.*

Some are formal and explicit, like rules, i[...]
procedures.

Others are informal and implicit, like unw[...]
and routines.

Why do we behave in the way that we do[...]
What causes or influences our behaviors[...]
What are leaders saying or doing that en[...]
behaviors?
How are people rewarded for their behaviors (both positive and negative)?
How does the physical workspace enable certain behaviors?
What needs are being met by these behaviors?
What blocks us from behaving differently?
What are the unwritten rules?
What habits or routines are easy to change? Why?

- "WE ARE THE FUTURE"
  - transportation as a service
  - first mover

- "WE ARE WINNERS"
  - shared goal
  - *newness* of winning blinds everything else

- WE PROVIDE CERTAINTY
  - convenience
  - availability + quality

- WE CREATE A GREAT EXPERIENCE
  - order a ride from my phone
  - black car service, taxi price
  - payment in background; leave car immediately
  - Cashless

- "BE YOUR OWN BOSS"
  - flexible hours
  - make extra money

- company
- consumers
- drivers
- Participants

Fig No. 7 – Culture Mapping

| Field of use | Tool | Creator | Year | Description |
|---|---|---|---|---|
| Change & decision-making tool | Force field analysis Or (barrier & aids analysis) | Kurt Lewin | 1951 | Force field analysis (Lewin 1951) is widely used in change management and can be used to help understand most change processes in organizations.<br><br>useful decision-making tool. It helps you identify and analyze forces for and against change or the implementation of a proposed solution.<br><br>**Step 1: Define your plan for change**<br>What is your goal for the change?<br><br>**Step 2: Brainstorm forces for change**<br>What are the forces you can think of that would help you move forward with your plans? Remember to look at factors in both the internal and external environment.<br><br>**Step 3: Brainstorm forces against change**<br>What are the forces that are blocking you from implementing the changes? Fill out these sections for the analysis using the template below. |

**Force field analysis – Kurt Lewin**

Driving forces
(Positive Forces for Change)

Restraining forces
(Obstacles to change)

Present State
or
Desired State
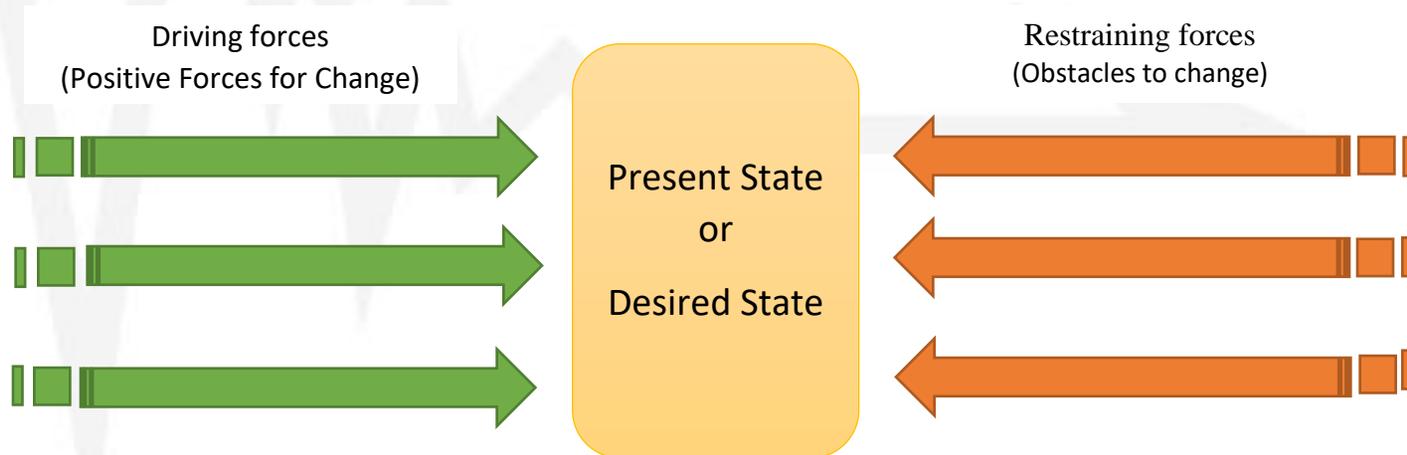
Fig No. 8 – Force Field Analysis

Fredrick Taylor

"Frederick Winslow Taylor (1856 – 1915)

was an American mechanical
engineer who sought to
improve industrial efficiency
He was one of the first management consultants,
& one of the intellectual leaders
of the Efficiency Movement
In 1911, he summed up his
efficiency techniques in his book
(The Principles of Scientific Management)"

| Field of use | Tool | Creator | Year | Description |
|---|---|---|---|---|
| A process of identifying the stakeholders before the project begins. | **Stakeholder Analysis** | | | **Stakeholder Analysis:** You identify stakeholders and categorize them based on different factors such as geography, income groups, occupation, legal requirements etc. At the end of the analysis, you'll have found out who your project's stakeholders are and why the project is important to them.<br><br>**Step 1: Identify the stakeholders**<br>Think of all the people who might be affected by your project. Remember to consider those who come from outside of your company as well.<br><br>**Step 2: Prioritize the stakeholders**<br>Your list of stakeholders may include people who may be affected by and care about your project and, who may be unaffected by and be not that interested in your project. Using a Power/interest grid for stakeholder analysis like the one besides, you can prioritize your stakeholders based on their stake in the project and their engagement.<br><br>**Step 3: Stakeholder map**<br>Now that you have prioritized your stakeholders, you can use a stakeholder map to easily categorize them. |



Fig No. 9 – Stakeholder Analysis

| Field of use | Tool | Creator | Year | Description |
|---|---|---|---|---|
| Strategic Planning | Balanced Scorecard | Dr. Robert Kaplan<br><br>&<br><br>Dr. David Norton | 1992 | A strategy management framework takes into account your:<br>• **Objectives**, which are high-level organizational goals.<br>• **Measures**, which help you understand if you're accomplishing your objective strategically.<br>• **Initiatives**, which are key action programs that help you achieve your objectives.<br>There are many ways you can create a Balanced Scorecard, including using a program like Excel, Google Sheets, or PowerPoint or using reporting software.(see Fig. No. 10-1)<br><br>**Characteristics of the Balanced Scorecard Model**<br>Information is collected and analyzed from four aspects of a business:<br><br>1. **Learning and growth** are analyzed through the investigation of training and knowledge resources. This first leg handles how well information is captured and how effectively employees use the information to convert it to a competitive advantage over the industry.<br>2. **Business processes** are evaluated by investigating how well products are manufactured. Operational management is analyzed to track any gaps, delays, bottlenecks, shortages, or waste.<br>3. **Customer perspectives** are collected to gauge customer satisfaction with quality, price, and availability of products or services. Customers provide feedback about their satisfaction with current products.<br>4. **Financial data,** such as sales, expenditures, and income are used to understand financial performance. These financial metrics may include dollar amounts, financial ratios, budget variances, or income targets.<br><br>(see Fig. No. 10-2)<br><br>These four legs encompass the vision and strategy of an organization and require active management to analyze the data collected. The balanced scorecard is thus often referred to as a management tool rather than a measurement tool. |
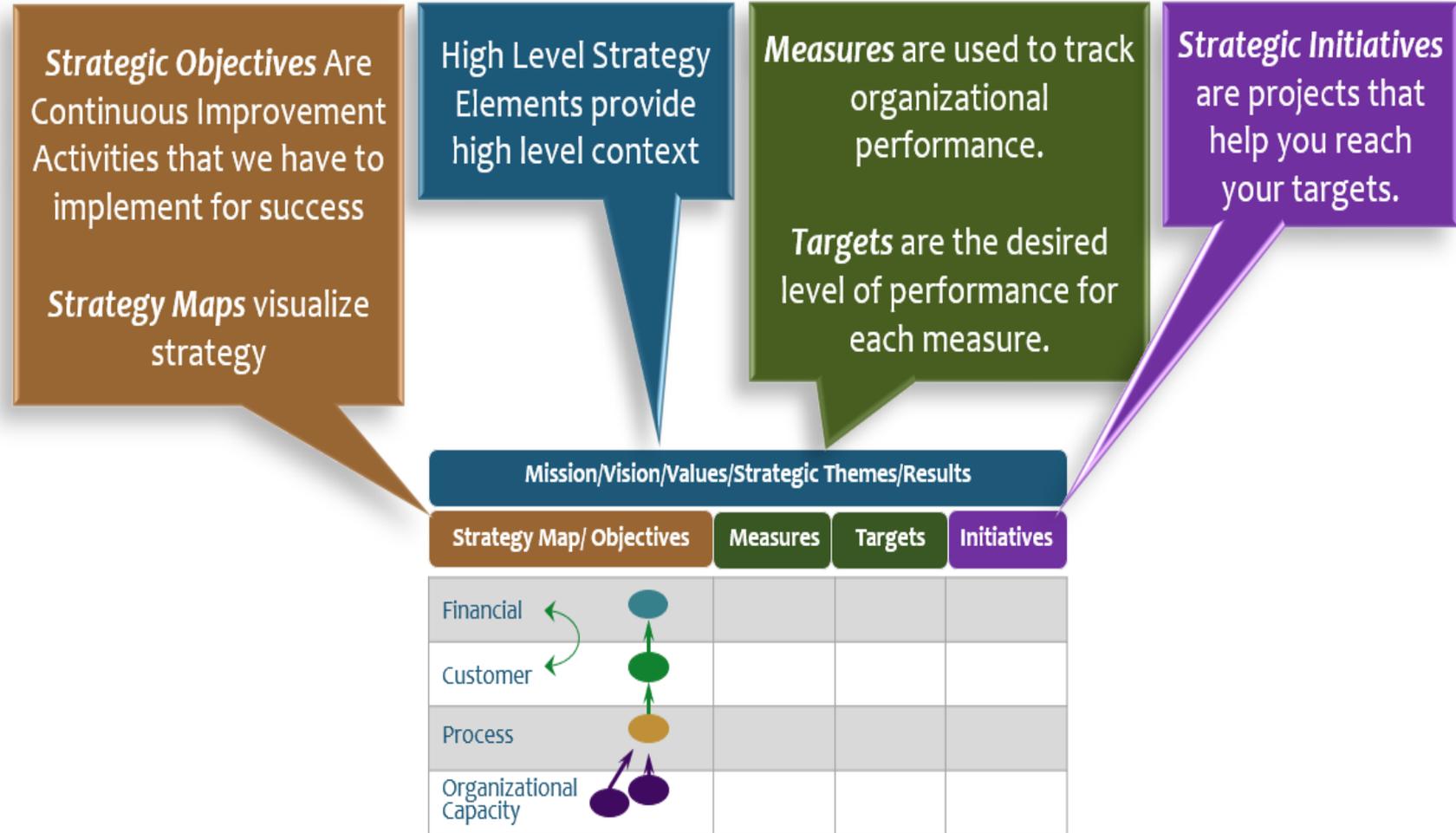
Fig No. 10-1 – Balanced Scorecard

## The Four Perspectives in More Detail

| Perspective | Focus | Example KPIs |
|---|---|---|
| Financial | Financial Performance | ROI<br>Operating Margin |
| Customer | Customer Satisfaction | Level of returns<br>Service rating |
| Internal Processes | Business Efficiency | New product lead time<br>Unit costs |
| Organisational Capacity | Knowledge & Innovation | Employee retention<br>Flow of NPD ideas |

tutor2u

Fig No. 10-2 – Balanced Scorecard

| Field of use | Tool | Creator | Year | Description |
|---|---|---|---|---|
| Evaluation of HR | HR Dashboard | | | Human resources (HR) dashboards aggregate and present employee data in a meaningful way, and are designed to help make the most of everyone's time, both within the HR team and throughout the entire organization. As a visual display of key metrics, HR dashboards simplify information gathering, and present data in a way that can be sorted, analyzed, and presented to management and executive teams.<br>Dashboards are also an efficient way to communicate with staff and stay abreast of what's happening in your company. |
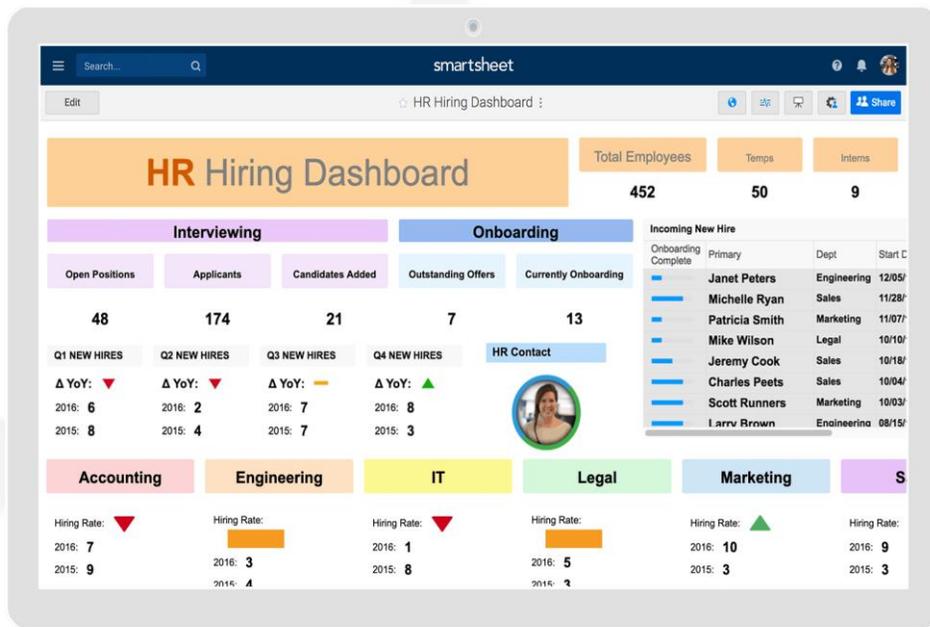


Fig No. 11-1 – HR Dashboard



Fig No. 11-2 – HR Dashboard

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| Field of use | Tool | Creator | Year | Description |
|---|---|---|---|---|
| Analyse the Business Environment | PESTEL | Francis J. Aguilar.<br><br>American | 1960s | PESTEL analysis is a business strategy framework which is used to identify, categories and analyses the key external threats and opportunities a firm faces now and into the future.<br>The six letters in PESTEL represent the 6 most common categories used:<br>- P for Political<br>- E for Economic<br>- S for Social (Socio-Economic)<br>- T for Technological<br>- E for Environmental<br>- L for Legal.<br>It is often termed a macro-scanning tool. This is because it involves looking a the big-picture long-term changes in the external environment. (The external environment is also sometimes called the macro-environment.)<br>A PESTEL analysis is a key input to most strategy development and execution processes. |

**P**
- Government policy
- Political stability
- Corruption
- Foreign trade policy
- Tax policy
- Labour law
- Trade restrictions

**E**
- Economic growth
- Exchange rates
- Interest rates
- Inflation rates
- Disposable income
- Unemploy-ment rates

**S**
- Population growth rate
- Age distribution
- Career attitudes
- Safety emphasis
- Health conscious-ness
- Lifestyle attitudes
- Cultural barriers

**T**
- Technology incentives
- Level of innovation
- Automation
- R&D activity
- Technological change
- Technological awareness

**E**
- Weather
- Climate
- Environmen-tal policies
- Climate change
- Pressures from NGO's

**L**
- Discrimina-tion laws
- Antitrust laws
- Employment laws
- Consumer protection laws
- Copyright and patent laws
- Health and safety laws

Fig No. 12 – PESTEL

Kurt Lewin

"Kurt Lewin (1890-1947)

was a German-American psychologist, known as one of the modern pioneers of social, organizational, and applied psychology in the United States.

In the 1940s, Lewin proposed a change management model (Unfreeze-Change-Freeze) that was perhaps the first and best-known presenter of how organizations adapt and cope with change"

| Field of use | Tool | Creator | Year | Description |
|---|---|---|---|---|
| Strategic Planning | SWOT | Albert Humphrey | 1960s 1970s | It is a high-level model used at the beginning of an organization's strategic planning. It is an acronym for "strengths, weaknesses, opportunities, and threats." Strengths and weaknesses are considered *internal factors*, and opportunities and threats are considered *external factors*.<br><br>Using a SWOT analysis helps an organization identify where they're doing well and in what areas they can improve. |



Fig No. 13 – SWOT Analysis

| Field of use | Tool | Creator | Year | Description |
|---|---|---|---|---|
| Organization Design | Galbraith's Star Model | Jay Galbraith | 1960s. | Jay Galbraith's Star Model is is used in the development of organizations as a basis for design choices.<br><br>In this model, an organization's design is divided into five categories:<br>- Strategy<br>- Structure<br>- Processes,<br>- Rewards<br>- Selection & Development.<br><br>These areas should be connected and outlined, in order to lay down a solid base and structure for the organization. By using Jay Galbraith's Star Model to work effectively in this phase of an organization's development, management increases the chances of achieving good performance later on, as well as the chances of a positive corporate culture.<br><br>In the middle of the five stars, the five categories, the organization functions as a center of gravity holding the whole of the five areas together. Those five design components can be controlled by management and may influence employees' behavior. For this reason, the design policy can be seen as a tool with which management will need to become skilled in order to effectively shape the organization. |
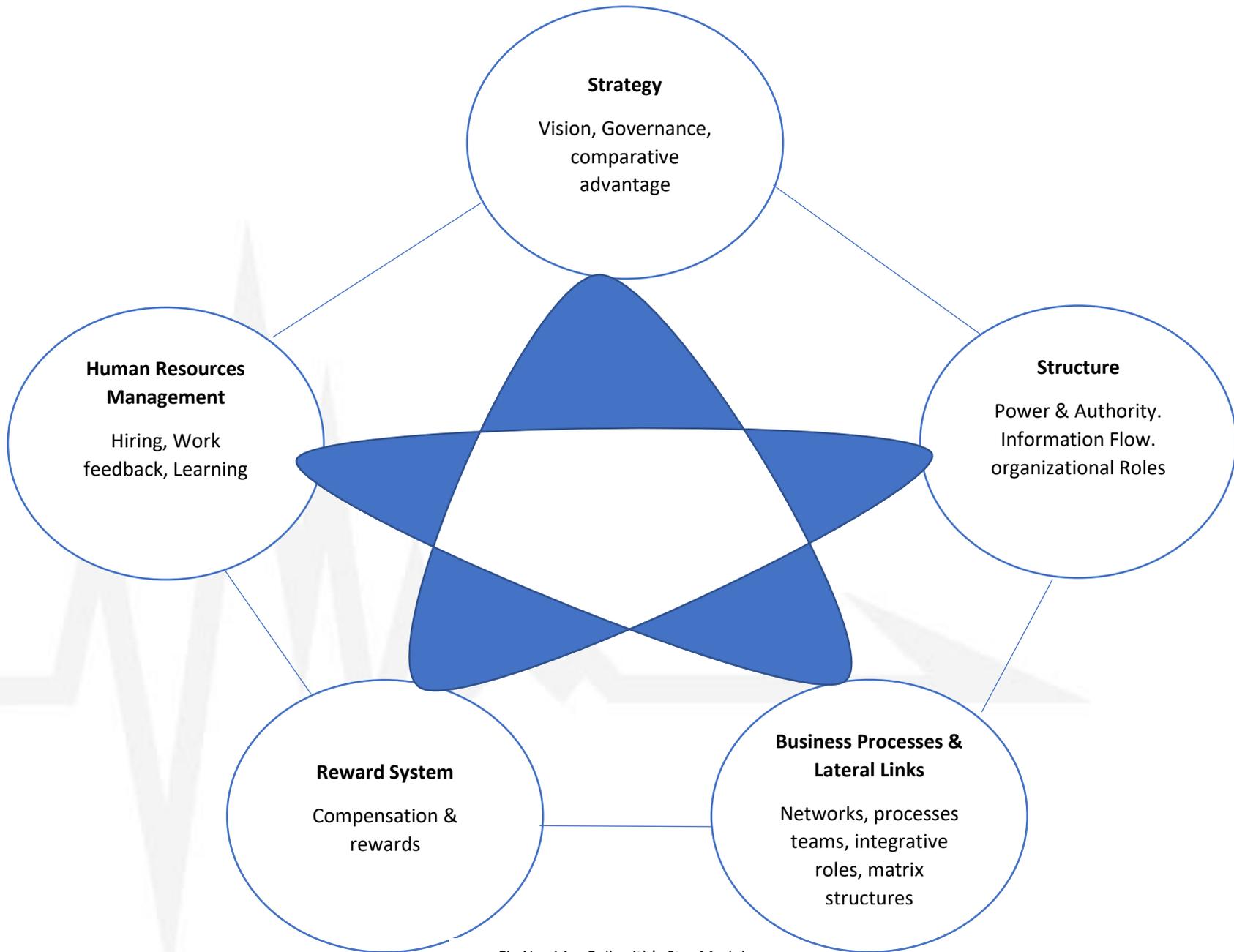
Fig No. 14 – Galbraith's Star Model

Strategy
Vision, Governance, comparative advantage

Structure
Power & Authority. Information Flow. organizational Roles

Human Resources Management
Hiring, Work feedback, Learning

Reward System
Compensation & rewards

Business Processes & Lateral Links
Networks, processes teams, integrative roles, matrix structures

| Field of use | Tool | Creator | Year | Description |
|---|---|---|---|---|
| Evaluate the Performance of Organizations | Weisbord 6 Box Model | Marvin Weisbord<br><br>American business analyst | | The **Weisbord Six-Box Model** uses six broad categories to conduct an organizational diagnosis of the issues within company. According to Weisbord, identifying and solving a problem is something that should be done systematically by the people themselves, because they are the most familiar with their own situation. A formal diagnosis is a way to bridge the gap between what is and what should be. Analyzing the six research areas enables organizations to uncover issues and draw conclusions in order to solve internal issues.<br><br>1. **Purpose**: Organizational purpose needs to be clear to all employees, and they must adhere to the purpose, even if their personal view is completely different.<br>2. **Structure**: The organizational structure of an organization contains the bigger picture of power relationships between employees and formal relationships between functional groups. Structure should provide a clear view of who is ultimately responsible for achieving the goals in an organization.<br>3. **Relationships:** Relationships include individuals, groups, and other functional sections that work together effectively.<br>4. **Rewards**: Reward systems, both formal and informal, must be analyzed in order to ensure appropriate reward levels are provided, so that employees remain motivated.<br>5. **Leadership**: Leadership refers mainly to the managers within an organization. Managers need to use the human resources, materials and equipment they have at their disposal in order to achieve the organization's goals. They also need to encourage collaboration between employees who are working on the same project or product.<br>6. **Helpful Mechanisms**: Helpful mechanisms are methods that help employees to coordinate their activities. Examples are descriptions of organizational approaches, procedures, seminars, notes, reports, perspectives, or integrated information systems. |
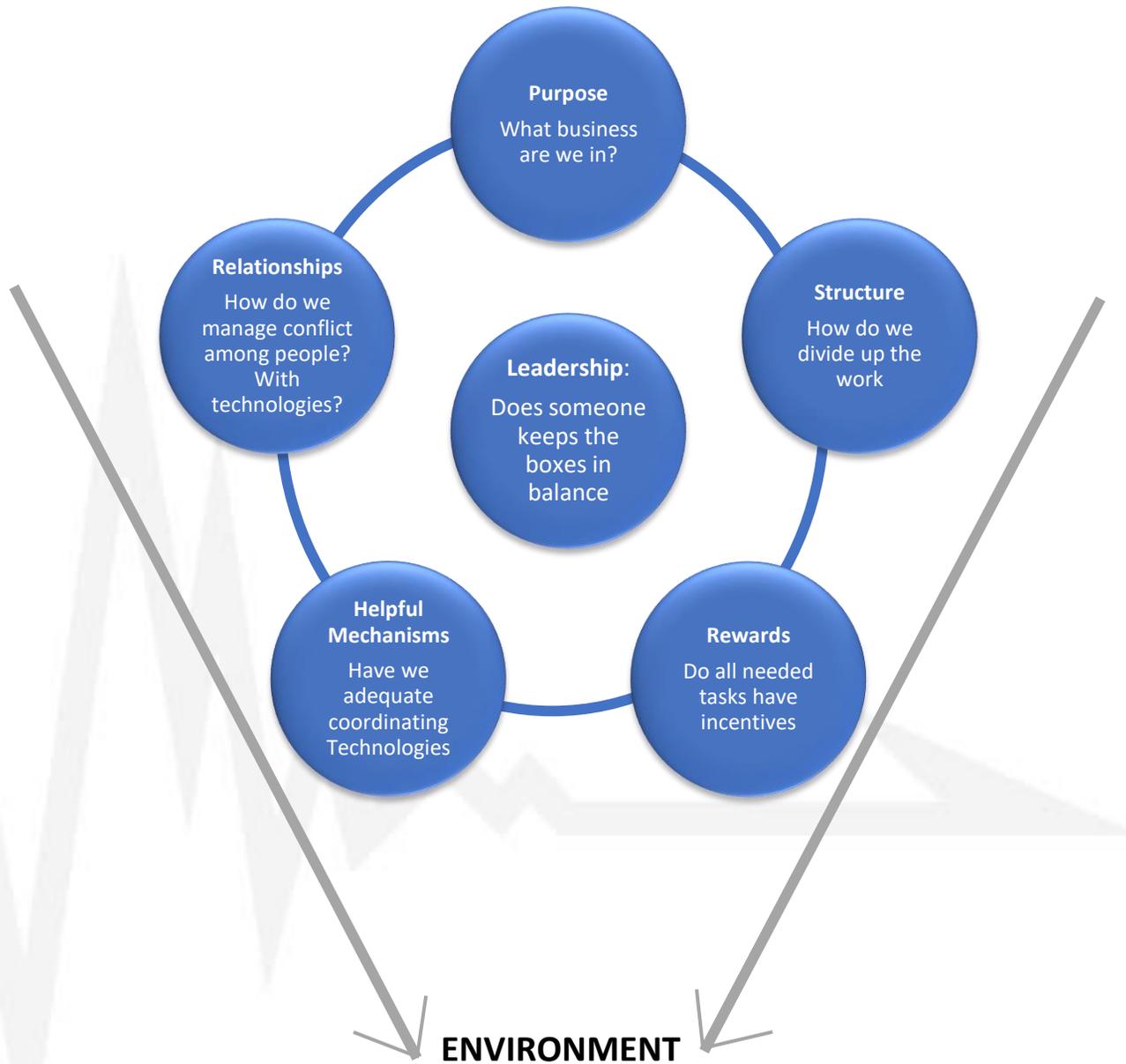
Fig No. 15 – Weisbord 6 Box Model

| Field of use | Tool | Creator | Year | Description |
|---|---|---|---|---|
| Evaluate the Performance of Organizations | Burke-Litwin "Causal" Model | W. Warner Burke & George H. Litwin. | in the 60's | The Performance and Change Model, a tool used to understand an organization's component parts and how they relate to each other in a time of change. A common reason for a change initiative failing is all areas of the organization affected by the change are not accounted for. Therefore, using this model can reveal what areas of the business are affected and how they are interrelated. The model also demonstrates the hierarchy of factors within an organization and hence the flow of influence from one factor to the next. The model is an example of 'open systems theory', which suggests change comes from external influences.<br><br>the primary variables that need to be considered in any attempt to predict and explain the total behavior output of an organization, the most important interactions between these variables, and how they affect change". There are four groups of elements within an organization; the external environment, transformational factors, transactional factors and performance. Each group then contains various elements of the organization.<br><br>The diagram (Fig. No. 16) demonstrates which elements belong in which group, how they interact with each other and the overall hierarchy of an organization.<br>The beginning and end of the process (yellow blocks) represent the input to the organization, **the external environment**, and the organization's output, **individual and organizational performance**.<br><br>- **External Environment –** This factor represents any forces or conditions outside of the organization that will affect its processes. An example could be consumer behavior or marketplace conditions.<br><br>- **Individual and Organizational Performance** – This factor is the overall output of the organization. This can be represented in many different ways, commonly turnover, productivity, customer satisfaction etc.<br><br>Transformational factors (purple blocks) are deeply embedded processes and characteristics of the organization. Any change that occurs to these factors will have substantial consequences to the rest of the organization. It is also true that any other change will require these factors' input and hence the arrows go in both directions. Lasting change to any of these factors is likely to sweep change throughout the organization. These factors will be most strongly affected by the external environment and will also have the strongest influence on transactional factors. |

- **Leadership** – The authors state this factor 'provides direction' to the rest of the organization. Individuals in leadership positions are responsible for developing a vision and motivating the rest of the organization to achieving it.

- **Mission and Strategy –** This factor describes the purpose of the organization and also the processes for how it will be achieved.

- **Organization Culture –** The norms and values of the organization. They will be less formal than the 'mission and strategy', but will still exist implicitly throughout the organization.

Transactional factors (pink blocks) refer to day-to-day operations within the organization. The authors argue these factors are strongly affected by management, rather than leadership. Change in these factors is only likely to lead to lasting change if, in turn, the transformational factors are also affected.

- **Management Practices –** Behaviors and activities of managers, usually aligned to carrying out the overall strategy.

- **Structure –** The breakdown of the organization i.e. hierarchy, departments, reporting channels.

- **Systems (Policies and Procedures) –** These are the mechanisms put in place to help and support employees. This may be legal systems or reward systems, for example.

- **Work Unit Climate –** The team's working environment. Ex., how well team members cooperate, how comfortable individuals feel expressing themselves or how well goals are set and rewarded.

- **Motivation –** The setting of goals to inspire and direct employees.

- **Task Requirements and Individual Skills/Abilities –** Matching the job description with the expertise of an employee.

- **Individual Needs and Values –** Employees will expect certain demands, such as pay, work/life balance, responsibility etc. to be met in their role.

The two main uses of the model are to either diagnose a problem within the organization or create an action plan (often for a change initiative). Firstly, the group should be identified where either the change is coming from or being planned for. Then within that group the specific element should be identified. Once this has occurred, all affected elements can also be identified.
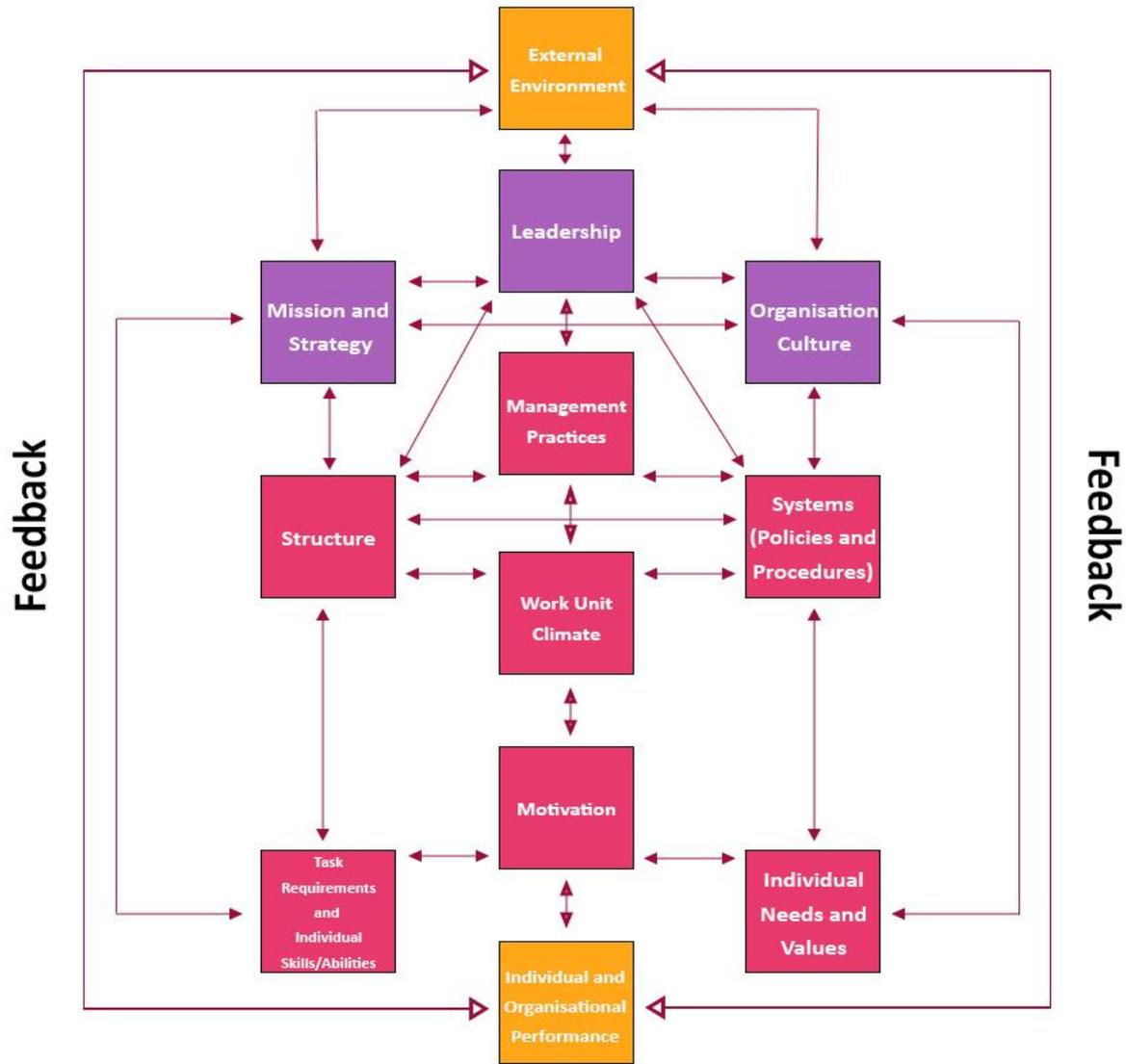
# The Burke-Litwin Change Model



Fig No. 16 – Burke-Litwin Change Model

Michael Porter

" **Michael Eugene Porter (1947)**

is an American academic known
for his theories on economics,
business strategy, and social causes.
He is a Professor at Harvard Business School,
He is credited for creating
Porter's five forces analysis,
which is instrumental in business
strategy development and analyzing industries. "

| Field of use | Tool | Creator | Year | Description |
|---|---|---|---|---|
| Decision Making & Problem Solving | Pareto Analysis | Vilfredo **Pareto** Italian economist, | 1940's | Pareto Analysis is a statistical technique in decision-making used for the selection of a limited number of tasks that produce significant overall effect. It also known as the 80/20 rule, the idea that by doing 20% of the work you can generate 80% of the benefit of doing the entire job. Take quality improvement, for example, a vast majority of problems (80%) are produced by a few key causes (20%). In the late 1940s Romanian-born American engineer and management consultant, Joseph M. Juran suggested the principle and named it after Italian economist Vilfredo Pareto, who observed that 80% of income in Italy went to 20% of the population. Pareto later carried out surveys in some other countries and found to his surprise that a similar distribution applied. <br><br> **We can apply the 80/20 rule to almost anything:** <br><br> • 80% of customer complaints arise from 20% of your products and services. <br><br> • 80% of delays in the schedule result from 20% of the possible causes of the delays. <br><br> • 20% of your products and services account for 80% of your profit. <br><br> • 20% of your sales force produces 80% of your company revenues. <br><br> • 20% of a systems defects cause 80% of its problems. <br><br> **Pareto Chart Procedures:** <br><br> 1. Decide what categories you will use to group items. <br> 2. Decide what measurement is appropriate. Common measurements are frequency, quantity, cost and time. <br> 3. Decide what period of time the Pareto chart will cover: One work cycle? One full day? A week? <br> 4. Collect the data, recording the category each time, or assemble data that already exist. <br> 5. Subtotal the measurements for each category. <br> 6. Determine the appropriate scale for the measurements you have collected. The maximum value will be the largest subtotal from step 5. (If you will do optional steps 8 and 9 below, the maximum value will be the sum of all subtotals from step 5.) Mark the scale on the left side of the chart. |

| | | | | 7. Construct and label bars for each category. Place the tallest at the far left, then the next tallest to its right, and so on. If there are many categories with small measurements, they can be grouped as "other."<br><br>**Note:** Steps 8 and 9 are optional but are useful for analysis and communication.<br><br>8. Calculate the percentage for each category: the subtotal for that category divided by the total for all categories. Draw a right vertical axis and label it with percentages. Be sure the two scales match. For example, the left measurement that corresponds to one-half should be exactly opposite 50% on the right scale.<br>9. Calculate and draw cumulative sums: add the subtotals for the first and second categories, and place a dot above the second bar indicating that sum. To that sum add the subtotal for the third category, and place a dot above the third bar for that new sum. Continue the process for all the bars. Connect the dots, starting at the top of the first bar. The last dot should reach 100% on the right scale. |
|---|---|---|---|---|

**Types of Customer Complaints**
Second Quarter 2005

Fig No. 17.1 – Pareto Analysis

**Types of Document Complaints**
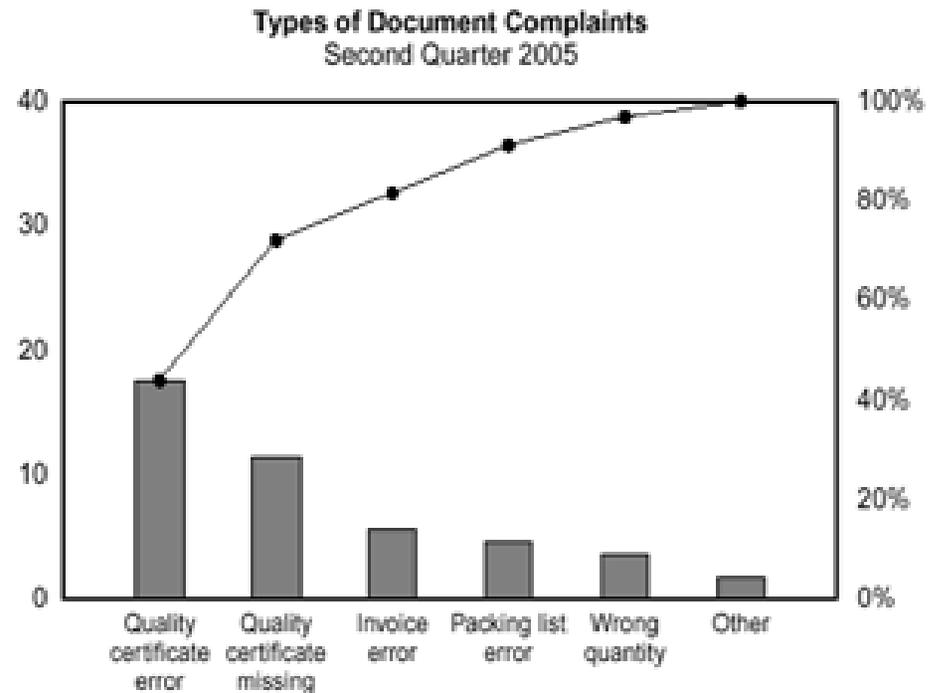Second Quarter 2005

Fig No. 17.2 – Pareto Analysis

Dave Ulrich

**"David Olson Ulrich (1953)**

**is a university professor, author,
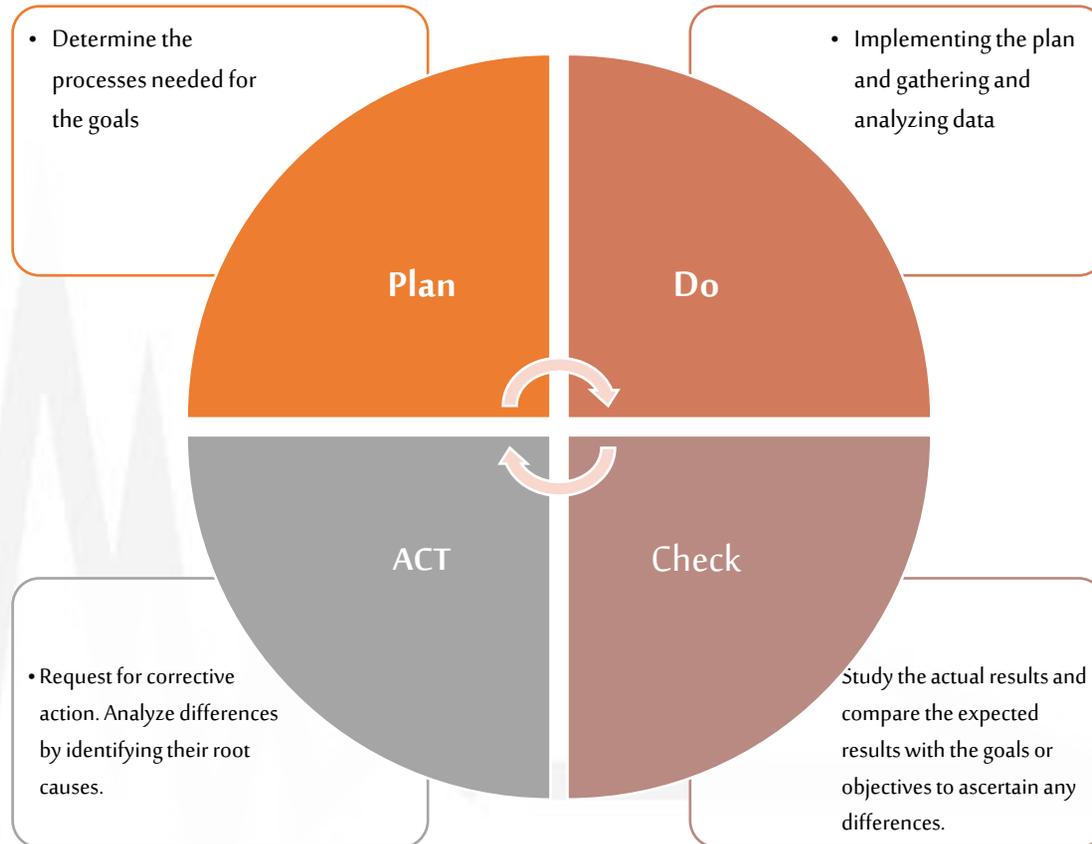speaker, management coach, and
management consultant.
With his colleagues, he has
written over 30 books that have
shaped the HR profession,
He is a Fellow in the National
Academy of Human Resources,
Dave Ulrich has been ranked the
#1 Management Educator & Guru by BusinessWeek,
He named the most influential
thinker in HR of the decade by HR magazine."**

| Field of use | Tool | Creator | Year | Description |
|---|---|---|---|---|
| Change Management<br><br>&<br><br>Project Planning Tool. | PDCA cycle | Edward Deming | | The Plan-do-check-act cycle is a four-step model for carrying out change. Just as a circle has no end, the PDCA cycle should be repeated again and again for continuous improvement. The PDCA cycle is considered a project planning tool.<br><br>Use the PDCA cycle when:<br><br>1. Starting a new improvement project<br>2. Developing a new or improved design of a process, product, or service<br>3. Defining a repetitive work process<br>4. Planning data collection and analysis in order to verify and prioritize problems or root causes<br>5. Implementing any change<br>6. Working toward continuous improvement<br><br>**The Plan-do-check-act Procedure**<br><br>7. **Plan:** Recognize an opportunity and plan a change. Determine the processes needed for the goals<br>8. **Do:** Test the change. Carry out a small-scale study. Implementing the plan and gathering and analyzing data<br>9. **Check:** Study the actual results and compare the expected results with the goals or objectives to ascertain any differences.<br>10. **Act:** Take action based on what you learned in the study step. Request for corrective action. Analyze differences by identifying their root causes.<br><br>If the change did not work, go through the cycle again with a different plan. If you were successful, incorporate what you learned from the test into wider changes. Use what you learned to plan new improvements, beginning the cycle again. |

- Determine the processes needed for the goals

- Implementing the plan and gathering and analyzing data

**Plan**

**Do**

**ACT**

Check

• Request for corrective action. Analyze differences by identifying their root causes.

Study the actual results and compare the expected results with the goals or objectives to ascertain any differences.

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**نبض التخطيط**
**للإستشارات الإدارية**

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