



Adapted from “Field Guide to Consulting and Organizational Development” – to obtain the entire book, select “Publications” at <http://www.authenticityconsulting.com>

Examples of Systems View of Management Functions

The following tables depict various examples of common management systems. Knowledge of the systems will come in handy later on when working with your client to analyze issues in their organization and what can be done to address those issues.

Each of the tables depicts highlights of the activities in that particular management system – not all possible activities in that system. Examples include management systems for:

- Board operations
- Strategic planning
- Business planning
- Management development
- Human resource management
- Financial management
- Advertising and promotion
- Evaluation of products and services

Table II:9 – Examples of Management Systems for Specific Functions

Management System for Board of Directors					
Inputs	Processes				Outputs
	Planning	Developing	Operating	Evaluating	
<ul style="list-style-type: none"> ▪ Past evaluation results of Board ▪ Annual calendar ▪ Mission, vision, values, goals ▪ Business plans ▪ Stockholders ▪ Laws and regulations on governance ▪ Employees ▪ Best practices on Boards 	<ul style="list-style-type: none"> ▪ Board policies and procedures ▪ Job descriptions ▪ Board organization chart ▪ Board Committee work plans 	<ul style="list-style-type: none"> ▪ Form Board Develop. Committee ▪ Recruit members ▪ Provide Board Manual ▪ Train members about Boards ▪ Orient members about the organization ▪ Organize members into committees 	<ul style="list-style-type: none"> ▪ Attend meetings ▪ Research, discussions, debates ▪ Motions, decisions ▪ Strategic planning ▪ Supervise CEO ▪ Conduct public relations ▪ Review financials ▪ Declare stock equity and dividends 	<ul style="list-style-type: none"> ▪ Meeting evaluations ▪ Quality of attendance, participation, teamwork, strategic decisions? ▪ Board self-evaluation annually ▪ Board Develop. Plan to address results of evaluations 	<ul style="list-style-type: none"> ▪ Board minutes with decisions ▪ Directions to CEO ▪ Public speeches ▪ Financial reviews ▪ Board Develop. Plan ▪ Updated Board policies and procedures

Management System for Strategic Planning					
Inputs	Processes				Outputs
	Planning	Developing	Operating	Evaluating	
<ul style="list-style-type: none"> ▪ Past results of types of evaluations ▪ Past Strategic Plan ▪ Business plans ▪ Board and employees ▪ Researchers and experts on trends, industries, product and services ▪ Best practices on planning 	<ul style="list-style-type: none"> ▪ Clarify purposes of planning ▪ Decide time span of Strategic Plan ▪ Select planning model ▪ Select participants ▪ Identify needed outside help ▪ Identify needed materials 	<ul style="list-style-type: none"> ▪ Form Planning Committee ▪ Hire, orient facilitator ▪ Announce planning process ▪ Train on strategic planning ▪ Orient experts the organization ▪ Design research plans ▪ Schedule sessions 	<ul style="list-style-type: none"> ▪ Develop/review mission, vision, values ▪ External analysis ▪ Internal analysis ▪ Establish strategic goals ▪ Develop action plans ▪ Develop Operating Plan ▪ Develop Budget 	<ul style="list-style-type: none"> ▪ Provide clear mission, goals, actions, budget? ▪ Satisfaction checks during planning ▪ Plan being implemented? ▪ Implementation on schedule? 	<ul style="list-style-type: none"> ▪ Strategic Plan ▪ SWOT information ▪ New/updated mission, vision, values, goals ▪ Action plans ▪ Operating Plan ▪ Budget ▪ Performance goals for Board members and employees

Table II:10 – Examples of Management Systems for Specific Functions (Cont.)

Management System for Business Planning					
Inputs	Processes				Outputs
	Planning	Developing	Operating	Evaluating	
<ul style="list-style-type: none"> ▪ Mission, vision, values, goals ▪ Markets ▪ Target markets ▪ Board members and employees ▪ Experts on markets and the industry ▪ Best practices on business planning 	<ul style="list-style-type: none"> ▪ Clarify purposes of planning ▪ Plan market research ▪ Select participants in the planning ▪ Identify any needed outside help ▪ Identify any needed materials and tools 	<ul style="list-style-type: none"> ▪ Hire researchers ▪ Train on marketing analysis and business planning ▪ Orient researchers and any experts on the mission ▪ Design research plans ▪ Schedule analysis and planning sessions 	<ul style="list-style-type: none"> ▪ Market research to identify target markets ▪ Identify needs and wants of each target ▪ Specify product or service for target(s) ▪ Describe how product or service is developed and sold ▪ Compute financials 	<ul style="list-style-type: none"> ▪ Provide clear product description? ▪ Satisfaction checks during planning ▪ Plan being implemented? ▪ Implementation on schedule? 	<ul style="list-style-type: none"> ▪ Business Plan ▪ Product description ▪ Marketing plan ▪ Management plan ▪ Financials ▪ Trained employees about the product or service development and delivery

Management System for Management Development					
Inputs	Processes				Outputs
	Planning	Developing	Operating	Evaluating	
<ul style="list-style-type: none"> ▪ Mission, values, goals ▪ Strategic Plan ▪ Action plans ▪ Operating Plan ▪ Business plans ▪ Personnel policies ▪ Current managers ▪ New managers ▪ Best practices on leadership, management 	<ul style="list-style-type: none"> ▪ Assessment of current leadership and management capacities ▪ Identify training goals (needed capacities) ▪ Update personnel policies on compensation, hiring, delegating, firing, etc. 	<ul style="list-style-type: none"> ▪ Form Board Personnel Committee? ▪ Design training methods ▪ Develop training materials (or select courses) ▪ Develop evaluation plans ▪ Integrate training goals in performance plans 	<ul style="list-style-type: none"> ▪ Organize leaders and managers into trainings ▪ Conduct in-house trainings ▪ Attend outside trainings ▪ Conduct on-the-job trainings ▪ Apply new learning to the workplace 	<ul style="list-style-type: none"> ▪ Evaluate during training activities ▪ Quality of planning, organizing, leading, controlling? ▪ Delegating? ▪ Managing conflicts? ▪ Managing meetings? ▪ Redo assessment at end of trainings 	<ul style="list-style-type: none"> ▪ Initial assessment results ▪ Training plans ▪ Applied learning from participants ▪ Updated personnel policies ▪ Final assessment results

Other Books by the Author

Table II:10 – Examples of Management Systems for Specific Functions (Cont.)

Management System for Human Resource Management					
Inputs	Processes				Outputs
	Planning	Developing	Operating	Evaluating	
<ul style="list-style-type: none"> ▪ Mission, values, goals ▪ Strategic Plan ▪ Action plans ▪ Business plans ▪ Personnel policies ▪ Board members and employees ▪ Best practices on leadership, management 	<ul style="list-style-type: none"> ▪ Update personnel policies and procedures ▪ Update job descriptions ▪ Update employee organization chart ▪ Select recruitment methods and tools 	<ul style="list-style-type: none"> ▪ Form Board Personnel Committee ▪ Recruit, hire members ▪ Provide Personnel Manual ▪ Develop training methods ▪ Orient, train, organize members ▪ Develop equipment, supplies, etc. 	<ul style="list-style-type: none"> ▪ Establish goals for employees ▪ Share feedback ▪ Administer the offices ▪ Develop and deliver products and services ▪ Marketing ▪ Financial management ▪ Evaluations 	<ul style="list-style-type: none"> ▪ Goals achieved by employees? ▪ Low conflicts, turnover? ▪ High morale? ▪ Do annual performance reviews ▪ Reward positive performance ▪ Implement performance improvement plans 	<ul style="list-style-type: none"> ▪ Status reports ▪ Meeting minutes ▪ Project reviews ▪ Financial reviews ▪ Updated personnel policies ▪ Update job descriptions, charts, etc. ▪ Performance reviews

Management System for Financial Management					
Inputs	Processes				Outputs
	Planning	Developing	Operating	Evaluating	
<ul style="list-style-type: none"> ▪ Laws and regulations ▪ Fiscal policies and procedures ▪ Strategic Plan ▪ Action plans ▪ Business plans ▪ Last year's budget ▪ Best practices on financial management 	<ul style="list-style-type: none"> ▪ Update fiscal policies and procedures ▪ Review plans to identify needed resources ▪ Identify costs to obtain and support resources ▪ Develop Budget 	<ul style="list-style-type: none"> ▪ Form Board Finance Committee? ▪ Train Board on how to analyze finances ▪ Obtain software to manage financial information ▪ Obtain expertise to do bookkeeping, statements 	<ul style="list-style-type: none"> ▪ Enter bookkeeping transactions ▪ Generate financial statements ▪ Analyze statements ▪ Support annual audit ▪ Implement recommendations from audit 	<ul style="list-style-type: none"> ▪ Transactions tracked fully? ▪ Financial statements reviewed? ▪ Shortage of funds? ▪ Bills paid on time? ▪ Cash crises? ▪ Issues addressed from audit? 	<ul style="list-style-type: none"> ▪ Updated fiscal policies and procedures ▪ Budget ▪ Financial statements ▪ Audit findings ▪ Invoices, receipts, checks, etc.

Table II:10 – Examples of Management Systems for Specific Functions (Cont.)

Management System for Advertising and Promotions					
Inputs	Processes				Outputs
	Planning	Developing	Operating	Evaluating	
<ul style="list-style-type: none"> ▪ Mission, vision, values, goals ▪ Strategic Plan ▪ Business plans ▪ Target markets ▪ Employees ▪ Best practices on advertising and promotions 	<ul style="list-style-type: none"> ▪ Specify each product's benefits ▪ Clarify each product's target groups ▪ For each target, associate product's benefits with target's needs ▪ Specify preferred public image for organization 	<ul style="list-style-type: none"> ▪ Form Board Marketing Committee? ▪ Develop methods to advertise each product to its target groups (brochures, flyers, etc.) ▪ Develop methods to convey public image (logo, slogans, etc.) 	<ul style="list-style-type: none"> ▪ Use methods to convey each product's benefits to its target groups ▪ Use methods to cultivate public image with important stakeholders 	<ul style="list-style-type: none"> ▪ Implementation of advertising plan on schedule? ▪ Implementation of PR plan on schedule ▪ Increase in sales leads? ▪ Increase in customers for the product? ▪ Increased relationships with stakeholders? 	<ul style="list-style-type: none"> ▪ Advertising and Promotions Plan ▪ Flyers, brochures, testimonials, presentations, etc. ▪ Logo, slogans, web site, newsletters, etc.

Management System for Evaluations of Products and Services					
Inputs	Processes				Outputs
	Planning	Developing	Operating	Evaluating	
<ul style="list-style-type: none"> ▪ Process to develop products and services ▪ Process to sell products and services ▪ Employees ▪ Evaluation experts ▪ Best practices for evaluations 	<ul style="list-style-type: none"> ▪ Identify which product aspects to evaluate (process, outcomes, etc.) ▪ What information is needed? ▪ How get information, who and when? 	<ul style="list-style-type: none"> ▪ Form Board Products Committee? ▪ Develop information collection methods ▪ Develop Evaluation Plan ▪ Train employees to use data collection and analyses methods 	<ul style="list-style-type: none"> ▪ Collect information ▪ Analyze information ▪ Identify strengths, weaknesses, issues, progress to outcomes, etc. ▪ Generate recommendations to address findings 	<ul style="list-style-type: none"> ▪ Process strengths and weaknesses? ▪ Customer satisfaction? ▪ Adjustments to make to develop and sell products and services? 	<ul style="list-style-type: none"> ▪ Information collection methods ▪ Collected information ▪ Evaluation reports ▪ Recommendations about products and services