1. **Planning and Decision Making – Determining Courses of Action**

Looking ahead into the future and predict possible trends or occurrences which are likely to influence the working situation is the most vital quality as well as the [job of a manager](https://iedunote.com/managerial-skills).

Planning means setting an organization’s goal and deciding how best to achieve them.

[Planning is decision making](https://iedunote.com/planning-decision-making-relation), regarding the goals and setting the future course of action from a set of alternatives to reach them.

The plan helps to maintain the managerial effectiveness as it works as a guide for the personnel for the future activities. Selecting goals as well as the [paths to achieve them](https://iedunote.com/path-goal-theory-leadership) is what planning involves.

Planning involves selecting missions and objectives and the actions to achieve them, it requires decision-making or choosing future courses of action from among alternatives.

In short, planning means determining what the organization’s position and the situation should be at some time in the future and decide how best to bring about that situation.

Planning helps maintain [managerial effectiveness](https://iedunote.com/measure-management-effectiveness-performance) by guiding future activities.

For a manager, planning and decision-making require an ability to foresee, to visualize, and to look ahead purposefully.

**2. Organizing – Coordinating Activities and Resources**

Organizing can be defined as the process by which the established plans are moved closer to realization.

Once a manager [set goals and develops plans](https://iedunote.com/planning-types), his next managerial function is organizing human and other resources that are identified as necessary by the plan to reach the goal.

Organizing involves determining how activities and resources are to be assembled and coordinated.

The organization can also be defined as an [intentionally formalized structure of positions or roles](https://iedunote.com/management-levels-hierarchy) for people to fill in an organization.

Organizing produces a [structure of relationships in an organization](https://iedunote.com/line-and-staff-relationship-in-organization) and it is through these structured relationships that future plans are pursued.

Organizing, then, is that part of managing which involves: establishing an intentional structure of roles for people to fill in the organization.

It is intentional in the sense of making sure that all the tasks necessary to accomplish goals are assigned to people who can do the best.

The [purpose of an organization structure](https://iedunote.com/organizational-structure-elements) is to create an environment for best human performance.

The structure must define the task to be done. The rules so established must also be designed in the light of the abilities and motivations of the people available.

Staffing is related to organizing and it involves filling and keeping filled, the positions in the organization structure.

This can be done by determining the positions to be filled, identifying the requirement of manpower, filling the vacancies and [training employees](https://iedunote.com/training-programs) so that the assigned tasks are accomplished effectively and efficiently.

The managerial functions of promotion, demotion, discharge, dismissal, transfer, etc.  Are also included with the broad task “staffing.” staffing ensures the placement of the right person at the right position.

Basically organizing is deciding where decisions will be made, who will do what jobs and tasks, who will work for whom, and how resources will assemble.

**3. Leading – Managing, Motivating and Directing People**

The third basic managerial function is [leading](https://iedunote.com/leadership). The [skills of influencing people](https://iedunote.com/great-leader-qualities) for a particular purpose or reason is called leading. Leading is considered to be the most important and challenging of all managerial activities.

Leading is influencing or prompting the member of the organization to work together with the interest of the organization.

Creating a positive attitude towards the work and goals in among the members of the organization is called leading. It is required as it helps to serve the [objective of effectiveness and efficiency](https://iedunote.com/effectiveness-efficiency-productivity-management) by changing the behavior of the employees.

Leading involves a number of deferment processes and activates.

The functions of direction, [motivation](https://iedunote.com/motivation-definition-meaning), [communication](https://iedunote.com/effective-communication-principles), and coordination are considered a part of leading process or system.

Coordinating is also essential in leading.

Most authors do not consider it a separate function of management.

Rather they regard coordinating as the essence of manager ship for achieving harmony among individual efforts towards accomplishing group targets.

Motivating is an essential quality for leading. Motivating is the function of management process of influencing people’s behavior based on the knowledge of what cause and channel sustain human behavior in a particularly committed direction.

[Efficient managers need to be effective leaders](https://iedunote.com/leaders-are-born-managers-are-made).

Since leadership implies fellowship and people tend to follow those who offer a means of satisfying their own needs, hopes and aspirations it is understandable that leading involves motivation leadership styles and approaches and communication.

**4. Controlling – Monitoring and evaluating activities**

Monitoring the organizational progress toward goal fulfillment is called controlling. Monitoring the progress is essential to ensure the [achievement of organizational goal](https://iedunote.com/goal-setting-theory).

Controlling is measuring, comparing, finding deviation and correcting the organizational activities which are performed for achieving the goals or objectives. Controlling consist of activities, like; measuring the performance, comparing with the existing standard and finding the deviations, and correcting the deviations.

Control activities generally relate to the measurement of achievement or results of actions which were taken to attain the goal.

Some means of controlling, like the [budget for expenses](https://iedunote.com/budgetary-controlling-techniques), inspection records, and the record of labor hours lost, are generally familiar. Each measure also shows whether plans are working out.

If deviations persist, correction is indicated. Whenever results are found to differ from the planned action, persons responsible are to be identified and necessary actions are to be taken to improve performance.

Thus outcomes are controlled by controlling what people do. Controlling is the last but not the least important management function process.

It is rightly said, “planning without controlling is useless”. In short, we can say the controlling enables the accomplishment of the plan.

All the management functions of its process are inter-related and cannot be skipped.

The management process designs and maintains an environment in which personnel’s, [working together in groups](https://iedunote.com/people-join-group), accomplish efficiently selected aims.

All managers carry out the main functions of management; planning, organizing, staffing, leading and controlling. But depending on the skills and position on an organizational level, the time and labor spent in each function will differ.

### Management Levels: An Overview

Most organizations have three management levels:

* Low-level managers;
* Middle-level managers; and
* Top-level managers.

These managers are classified in a hierarchy of authority, and perform different tasks. In many organizations, the number of managers in every level resembles a pyramid.

Below, you’ll find the specifications of each level’s different responsibilities and their likely job titles.

### Top-level managers

The board of directors, president, vice-president, and CEO are all examples of top-level managers.

These managers are responsible for controlling and overseeing the entire organization. They develop goals, strategic plans, company policies, and make decisions on the direction of the business.

In addition, top-level managers play a significant role in the mobilization of outside resources.

Top-level managers are accountable to the shareholders and general public.

### Middle-level managers

General Managers, branch managers, and department managers are all examples of middle-level managers. They are accountable to the top management for their department’s function.

Middle-level managers devote more time to organizational and directional functions than top-level managers. Their roles can be emphasized as:

* Executing organizational plans in conformance with the company’s policies and the objectives of the top management;
* Defining and discussing information and policies from top management to lower management; and most importantly
* Inspiring and providing guidance to low-level managers towards better performance.

Some of their functions are as follows:

* Designing and implementing effective group and intergroup work and information systems;
* Defining and monitoring group-level performance indicators;
* Diagnosing and resolving problems within and among work groups;
* Designing and implementing reward systems supporting cooperative behavior.

### Low-level managers

Supervisors, section leads, and foremen are examples of low-level management titles. These managers focus on controlling and directing.

Low-level managers usually have the responsibility of:

* Assigning employees tasks;
* Guiding and supervising employees on day-to-day activities;
* Ensuring the quality and quantity of production;
* Making recommendations and suggestions; and
* Up channeling employee problems.

Also referred to as first-level managers, low-level managers are role models for employees. These managers provide:

1. Here some managerial skills

* Basic supervision;
* Motivation;
* Career planning;
* Performance feedback; and
* Staff supervision.
* Communication. One of the most important skills for project managers is great communication. ...
* Time Management. ...
* Organizational Awareness. ...
* Problem Solving. ...
* Leadership.

**Essential Skills for Managers**

* Good communication. Having good Communication skills is probably the most important skill of all for managers to have. ...
* Good Organization. Probably the second most important skill that you can have as a Manager is the ability to organize
* Team Building
* Leadership
* Ability to Deal with Changes Effectively
* Domain Knowledge.

1. **Planning**. **Planning** is the function of management that involves setting **objectives** and determining a course of action for achieving those **objectives**. **Planning** requires that managers be aware of environmental conditions facing their organization and forecast future conditions.

A specific result that a person or system aims to achieve within a time frame and with available resources. In general, **objectives** are more specific and easier to measure than goals. **Objectives** are basic tools that underlie all **planning** and strategic activities.

1. **Planning process**

### ****Identification of the Problem****

At this stage, the planner(s) and community leaders collect information to assess problems and needs. A variety of techniques may be used:

* Conduct surveys — Using a complete census of a given area, or sample surveys that focus on problems/concerns
* Hold community, village or town meetings — Identify key problems and issues
* Conduct interviews — With others who are involved or concerned such as other government agencies, non-government organizations, and community groups
* Use secondary data — Census or prior survey data to identify problems and needs

The planner and team see that many problems exist. The planner must work with staff and residents to select problems requiring attention. The planner needs to ask a number of questions at this stage to clarify the problem(s):

* What is the main problem of concern?
* Why is it a problem?
* Are existing resources available to eliminate the problem?
* Is another agency or organization trying to solve the problem?
* How severe is the problem?

It is important to realize that problems are not always what they seem to be at first glance. Detailed investigations, in addition to a consensus with community members, are needed prior to proceeding to the next stage.

Always remember: The way the problem is stated directs attention to the solutions.

### ****1.2 Goals and objectives****

Once the problems have been identified and agreed upon, the planner develops goals and objectives to alleviate the problem or needs. Goals are usually accompanied by detailed and specific objectives.

Definition: Goals are broad statements of desired accomplishments. Goals are usually accompanied by detailed and specific objectives.

In general, objectives can be defined as specific, measurable accomplishments to be achieved within a given time period. Developing clear objectives provides the guidelines for measuring progress and achievements. Objectives are written best if they are S.M.A.R.T.

S.M.A.R.T. Objectives

* Specific — indicates the target population for given services.
* Measurable — Indicates how many will be targeted.
* Area-specific — indicates the geographic location of the target population or community.
* Realistic — takes into account existing resources, and has the support of the target population or community involved.
* Time-Bound — should indicate the time period when accomplishments will be achieved.

### ****1.3 Development of Alternative Solutions****

There are several ways to achieve goals and objectives. At this stage the planner working with staff and community leaders, comes up with a list of alternative strategies to achieve the goals and objectives. There are 3 basic ways to collect information for this activity:

1. Investigate ways that other agencies and communities are achieving similar objectives.
2. Have staff and others generate ideas based on their personal experience.
3. Use knowledge gained from demonstration or pilot projects that offer possibilities in achieving the intended goals and objectives.

Once alternative strategies have been identified, evaluate each to determine which is the most appropriate for achieving goals and objectives. There are a number of ways to evaluate each alternative strategy.

* Financial considerations  
  how much would it cost to implement?
* Available resources  
  Are staff, money, and time to implement available?
* Target population  
  Will the target population accept the given strategy?
* Social costs  
  what are the long term positive and negative consequences of the strategy to the target population?
* Intended objectives  
  Will it achieve the intended objectives?

### ****1.4 Selection of Strategies and Development of Detail Plan****

Once a strategy (or group of strategies) has been selected, a detail plan to implement the strategy is developed. The development of the plan requires four types of activities:

1. Programming: Identify the activities or tasks that need to be completed in order to reach the desired objectives. In many cases, several major tasks or activities are required to achieve each objective. Activities then need to be put into the order in which they should be completed.
2. Allocating resources: Determine and assign the resources needed to implement the activities. Resources are normally divided into three general categories: human, physical (materials, facilities and equipment) and financial. In planning, both internal as well as external resources are identified. While it is important to identify resources within the organization to carry out specified activities, other public and private sector agencies can also play major roles in implementing the plan. Community members can also contribute to planning and implementation activities.
3. Scheduling: Establish the required time needed to complete each activity. This will involve an assessment of how long each task takes to be completed.
4. Fixing accountability: Determine specific individual and/or agencies/institutions responsible for the accomplishment of activities. Simple devices can be used to indicate tasks and planned completion time such as Gantt charts, which indicate tasks vertically (Y-axis) and time horizontally (X-axis).

### ****1.5 Monitoring and Evaluation****

Monitoring and evaluation help guide the following kinds of decisions:

* Continue or discontinue a program or component of a plan
* Improve existing programs/plans
* Add or drop a component or an entire program
* Institute a similar program elsewhere
* Reallocate resources among competing programs or program components

There are two types of evaluations:

1. Process evaluation: Helps program managers and policy makers redirect program activities to achieve desired goals. Process evaluation is concerned with the efficient use of resources such as personnel and equipment, and focuses on reducing waste and making more productive use of scarce resources. It is primarily concerned with finding better ways of implementing the plan.
2. Impact evaluations: Measure whether or not the plan is having an impact on the target population or environment. It is concerned with program effectiveness, that is, whether or not the plan is achieving its objectives.

Some people also refer to monitoring programs as a form of evaluation. Monitoring simply tracks the progress of program implementation and operation. It usually entails the development of an information system that is updated periodically to meet reporting requirements of certain activities, such as the expenditure of funds, the number of participants, allocation of staff to given tasks, and the completion of given tasks. Evaluation, however, is more concerned with addressing specific decisions concerning program success.

Program evaluations are successful if the following three conditions are met:

1. Program objectives are well defined in terms of specific measures of program performance
2. Intended uses of evaluations are well-defined, and
3. Monitoring and evaluation plans are developed.

Include an evaluation strategy in the plan to determine if goals and objectives are being achieved. The plan should include a time frame and budget for monitoring and evaluation.

### ****1.6 Developing a Simple Monitoring and Evaluation Plan****

1. Time Frame: Develop a schedule for monitoring and evaluating the plan. Determine how often it is necessary to monitor and evaluate progress in achieving each objective. For example, should it be quarterly, at the end of each year, or every 3 years?
2. Indicators: Develop indicators to measure progress in achieving each S.M.A.R.T. objective. If one of the objectives is to build 30 homes for residents, an indicator or measure of success could be the number of homes built.
3. Data sources: Indicate the types of information needed to measure indicators. How will the information be collected? Are service statistics, census data, sample surveys, and/or community focus group meetings.
4. Means of analysis: Once data are collected, identify ways to analyze it and produce reports.
5. Reporting: Identify ways to present the findings to different audiences within the community, village and/or regional office. Which method will be used to report findings? ...In addition verbal reports in meetings? Written reports? In addition, determine who will receive the reports.
6. Assigning responsible person(s): Identify and train, if necessary, individuals to implement the monitoring and evaluation strategy.

### Types of Plans

#### ****Operational Planning****

“Operational plans are about [how things need to happen](https://www.linkedin.com/pulse/3-major-types-plans-especially-lean-thinkers-mack-story),” motivational leadership speaker Mack Story said at LinkedIn. “Guidelines of how to accomplish the mission are set.”

This type of planning typically describes the day-to-day running of the company. Operational plans are often described as single use plans or ongoing plans. Single use plans are created for events and activities with a single occurrence (such as a single marketing campaign). Ongoing plans include policies for approaching problems, rules for specific regulations and procedures for a step-by-step process for accomplishing particular objectives.

#### ****Strategic Planning****

“Strategic plans are all about why things need to happen,” Story said. “It’s big picture, long-term thinking. It starts at the highest level with defining a mission and casting a vision.”

Strategic planning includes a high-level overview of the entire business. It’s the foundational basis of the organization and will dictate long-term decisions. The scope of strategic planning can be anywhere from the next two years to the next 10 years. Important components of a strategic plan are vision, mission and values.

#### ****Tactical Planning****

“Tactical plans are about what is going to happen,” Story said. “Basically at the tactical level, there are many focused, specific, and short-term plans, where the actual work is being done, that support the high-level strategic plans.”

Tactical planning supports strategic planning. It includes tactics that the organization plans to use to achieve what’s outlined in the strategic plan. Often, the scope is less than one year and breaks down the strategic plan into actionable chunks. Tactical planning is different from operational planning in that tactical plans ask specific questions about what needs to happen to accomplish a strategic goal; operational plans ask how the organization will generally do something to accomplish the company’s mission.

#### ****Contingency Planning****

Contingency plans are made when something unexpected happens or when something needs to be changed. Business experts sometimes refer to these plans as a special type of planning.

Contingency planning can be helpful in circumstances that call for a change. Although managers should anticipate changes when engaged in any of the primary types of planning, contingency planning is essential in moments when changes can’t be foreseen. As the business world becomes more complicated, contingency planning becomes more important to engage in and understand.

1. **Strategy allows your organization the ability to better anticipate and prepare for change.** You’ll lose valuable momentum and lead time being reactive rather than proactive. Customer expectations, regulatory requirements, competition, and economic changes are all variables that can rock the boat and send you to the bottom of the ocean if you don’t have strategies in place.
2. **The lack of a strategic plan can send employee morale down the drain.** Besides the obvious paycheck, people need a reason to come to work every day. Without a planned, focused future, morale falls and employee interaction becomes vague and lifeless. A strategic plan sheds light on who is doing what, why they’re doing it, and how they individually contribute to the success of the organization.
3. **It drives organizational growth.** Succeeding without a plan is possible, and there are plenty of examples of businesses who’ve seen financial success without one. If you’re one of them, consider yourself lucky, but ask yourself this question: *Could you have grown and become even more successful if you were better organized?* We’ve got money you’ll say yes.
4. **It sets a benchmark and helps you assess your performance.** A strategic plan by nature requires you to measure and document performance. Doing so will allow you to benchmark where you’ve been, allowing you to adjust your trajectory of where you are going. Documenting data is a wise business decision to keep your organization moving forward.
5. The Golden Arches are a staple fast food establishment around the globe, but Ronald and Co. hasn’t quite caught on in the Caribbean. The company made a good effort during its 10-year run in Jamaica, initially opening 11 stores on the island. A writer for [Moneymax101](http://jamaica-star.com/thestar/20051007/cleisure/cleisure1.html'%3eThe%20Jamaica%20Online%20Star%3c/a%3e%20blamed%20the%20small%20size%20of%20the%20burgers%20for%20failing%20to%20win%20over%20local%20palates,%20though%20%3ca%20href=) noted a number of other issues, including high barriers to running a McDonald’s franchise and a slow economy. In [Barbados](http://www.dailymail.co.uk/travel/holidaytypeshub/article-594891/Bewitched-Barbados.html), the company was there less than a year before closing due to lack of sales.

McDonald’s also saw less-than-stellar performance in Trinidad and Tobago, pulling out of the country in 2003 due to low sales. But Mickey D’s is nothing if not determined, and Arcos Dorados, a major McDonald’s franchiser in Latin America and the Caribbean, announced in 2011 that [the chain would reopen there](http://guardian.co.tt/2011/08/18/mcdonald-s-returns-tt).

1. **WalMart**

This famous shopping center is as American as apple pie — and that just may be its biggest problem abroad. WalMart has made forays into a number of foreign markets but been unable to replicate its original success in some, a problem that can be attributed to the corporation not fine-tuning the shopping experience to the local culture.  
For example, in South Korea, the company did not heed local preferences for buying small packages at a variety of local stores, the presence of native discount chains, and aesthetic preferences among shoppers, according to [The New York Times](http://www.nytimes.com/2006/08/02/business/worldbusiness/02walmart.html?pagewanted=all). Similar problems contributed to its closures in Germany, where customers could find groceries for lower prices at local stores.

In Japan, WalMart bought a share in the Seiyu Company, and attempted to implement its successful strategies in Seiyu stores, such as the “Every Day Low Prices” campaign.