



# 'The Difference Between Leadership and Management Schools of thought'

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## **Abstract:**

*This paper provides an extensive review of the literature on the differences between leadership and management. It finds that leadership skills are often defined as being the providing of vision and strategy as well as leading transformational change, while management skills are frequently considered to be planning, controlling and monitoring.*

*The subject of the differences between leadership and management has been discussed at length in the literature.*

*John Kotter (1990) developed a structure for determining the difference between leadership and management behaviour and tasks. Kotter's view was perhaps more extreme than Drucker's, but also supported it to a large degree. Kotter argued that leaders and managers have tasks that are almost opposite in nature. He felt that management works towards order and stability. Management does this because order will lead to consistency, and consistency to smooth and efficient-running operations – a goal of management. Conversely, Kotter purported that leadership strove to deliver constructive change and movement in organisations. He argued that successful leaders would seek “continual adaptive change” with a goal of continuously improving organisations for success. Kotter felt that leaders should aspire to continually*

*improve organisations so that they would have a greater chance of survival in a continually adapting business environment and those that stay static will not succeed. Kotter was a strong supporter of both leaders and managers in organisations however, arguing that both were necessary to an organisation that runs effectively.*

*A sense that can be gained from some an academic study by Kotter is that managers make the vision of leaders work. For example, leaders provide a sense of direction, reviewing the big picture, and then creating a vision. Managers take this vision and direction, commit to it and then establish timelines and agendas and secure resources to deliver on this vision. Managers make it happen, according to Kotter.*

*However, arguably leaders also make it happen – just in a different way. While managers are providing structure and frameworks of operation, leaders provide inspiration. Leaders determine the best direction and help to motivate individuals toward achieving the goals that have been set.*

*Both skills are fundamental to success in organisations. Likely without the inspiration and motivation of leadership, employees would be unproductive, but equally likely, without the structure, rules and processes of management, they would also be inefficient.*

*The paper is conceptual in design, with the aim of more completely understanding the different schools of thought that exists in the literature between leadership and management.*

*This paper focuses on only those thinkers who address their work on the similarities and differences between management and leadership. This paper takes some of the findings of the in-depth literature review to determine the most common distinctions that are made between leaders and managers.*

*The paper dispels the myth that leadership skills are good and management skills are bad, and reports that leaders can have management skills and vice versa. It explores the challenges associated with producing leadership and management development plans. A leadership and management development plan is produced for Prime Funds Group.*

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# Introduction

Management and leadership are terms that are frequently used interchangeably, however, they are not the same thing – they have quite distinct meanings. The two do have similarities but they also have important differences. This research report aims to understand the difference between leadership and management and why these differences are important. It also puts this into a modern context, so that they can be understood against a backdrop of increasingly technological workplaces and with regard to other aspects of organizations today, including areas such as teleworking and outsourcing, for example.

# Background

The world of work has undergone significant change in recent years, and it is important to understand these changes in order to gain perspective on this work.

Cooper (2005, p.1) states that:

*“By the end of the 1980s and into the early 1990s, a major restructuring of work as we have never known it since the industrial revolution was beginning to take place... Organizations throughout the Western world and even further afield, dramatically ‘downsized’, ‘de-layered’, ‘flattened’ or ‘right sized’. Whatever euphemism you care to use, the hard reality experienced by many was job loss and wrenching change”.*

As Cooper describes it, this has led to leaner organizations and less security, and new technologies that have in turn driven changes in both organizational structures and individual competencies. As companies face new challenges and the ever-increasing speed of change, there have been a number of fundamental changes in the way that businesses operate that affect leadership and management skills that are required by organizations. According to Cooper, these include becoming more flexible and adaptable, outsourcing parts of the business, a move to a white collar workforce rather than a blue collar one, and teleworking. Cooper argues that all of

these have fundamentally changed organizations and have led to entities that are flatter.

According to Cooper, organizations now need to manage “enormous change” as well as increase the diversity of work that they are doing. As a result, it may be argued that both leadership and management skills have had to adapt so that organizations are able to survive. Specifically, Burke and Cooper (2004) write about how management is now based around knowledge workers and the management of those individuals, and that information has become of great importance in the organization, and the volume of information to manage was considerably less in the past. This has clearly had a profound impact on the types of leadership and management skills that are required in organizations in the 21<sup>st</sup> century. Organizations have had to adapt to such dramatic changes, and correspondingly, leadership and management skills have changed.

Cooper (2005) goes on to argue that during the last few decades people have come to understand the management role as a “control mechanism”. In addition to having skills that are technical, these days one of the primary skills also required is that of managing people. Arguably this has always been the case of course, but Cooper discusses how this has never been truer. He also describes the work of Handy from 1976, who argued that the role of the manager as an occupation that people identify with had recently emerged at that time. Cooper writes that Handy argued that there were two main roles of managers – one was the manager as a person and the other the management as a General Practitioner. Managers have to develop skills to ensure that they are marketable on the one hand (the person side) but on the GP side, they have to deal with problems that require solutions. Cooper (2005, p. 5) states that this has led to managers who can diagnose organizational problem symptoms and address the problem, but who really do not necessarily understand the causes of the problem, leading these same issues to repeat over and over again.

Following Handy, a great many different researchers analyzed and produced typologies of leaders and managers, helping to uncover some of the core differences between the two. It is this area of focus that this research investigates.

## ***Definitions***

In developing research around the fields of leadership and management, it is essential to define each, at the outset. From reviewing the dictionary definitions, at first glance it may be seen that the two do not appear to be vastly different. Management is defined as:

*“The act or manner of managing, handling, direction, or control.”<sup>1</sup>*

On the other hand, leadership is described by the dictionary as:

*“An act or instance of leading; guidance; direction: They prospered under his strong leadership.”<sup>2</sup>*

This demonstrates that there are both similarities and differences between the two terms, even in the dictionary. Of particular note, a similarity is the use of the word “direction” in each. However, as also alluded to by Cooper, one very important difference is the use of control in the management definition, as compared with the use of the word guidance in the leadership definition. It is this type of difference, among others, that this research will be focusing on identifying and understanding in greater detail.

## Research Objectives

This research has a number of aims and objectives that are relevant to the field of effective human resource management. The main overriding objective from which all the others follow is:

*“To understand the difference between skills of leadership and management and to determine why this is important in organizations.”*

*This goal has various sub-aims and objectives that include:*

- To review how effective training and awareness programs might be in promoting an understanding of the differences between management and leadership within an organization.

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<sup>1</sup> From [www.dictionary.com](http://www.dictionary.com)

<sup>2</sup> From [www.dictionary.com](http://www.dictionary.com)



- To create an implementation plan for improving both leadership and management skills in an organization.
- To produce general recommendations for improvement of understanding of management and leadership responsibilities in a specific organization, Prime Funds.
- To understand and recognize similarities and differences, as well as strengths and weaknesses of both leadership and management. The outcome of this will be to be able to develop leaders and managers within Prime Funds, and facilitate the movement of this information filtering through the organization to all leadership and management levels

## Overview

In the upcoming chapters, this research report will be comprised of the following sections:

***Review of Research*** – during this chapter, a thorough review of the literature on leadership and management will be presented. This will endeavor to understand the strengths and weaknesses of both leadership and management, in addition to reviewing similarities and differences between the two concepts as leading academics and researchers have defined them.

***Analysis of Findings*** – this section will present the differences between leadership and management as uncovered during the research phase of this report. This section will also discuss any research limitations that arose during the study and the potential significance of these to the findings.

***Application of Findings to Prime Funds*** – this chapter will apply the findings to the researcher’s own organization, Prime Funds, and will deliver recommendations for this organization as to how an understanding of management and leadership responsibilities can be enhanced within the organization

***Presentation of Implementation Plan*** – a plan will be documented that describes how leadership and management skills can best be developed within the organization, including how information regarding each can be spread most effectively through the company to all levels of leadership.

**Concluding remarks and recommendations** – in the final chapter, the research will sum up the main findings of the research

## Review of the Research

A great many studies have been carried out into the differences between leadership and management. This review aims to identify the most important in order to be able to extract the fundamental differences between leadership and management, to be able to implement both sets of skills effectively in an organization, and provide recommendations of how this may be achieved. The work of academics with differing opinions is compared and contrasted to try to develop commonalities between the different bodies of research.

Very famously, Peter Drucker (1999) was of the opinion that leadership and management were completely distinct concepts. From the work of Edersheim and Drucker (2007, xi) he is known to have stated that:

*“Management is doing things right, leadership is doing the right things.”*

This provides a sense of some of the fundamental differences between leaders and managers, and as such, provides an excellent starting point. Returning momentarily to the definitions of leadership and management, it can be seen that this statement fits within the definitions that were provided. Providing a sense of direction is implicit in the roles of both leadership and management in Drucker’s statement. In addition, a sense of control is implied with regard to management but not to leadership. This is arguably also reflected to some degree in the work of Cooper (2005) that was already described in the Introduction chapter of this research. “Doing things right” might be considered to be very similar to the idea of a “control mechanism” as covered by Cooper. It might be argued that doing things right is something that management check when they are controlling the workload of their teams.

The literature varies on the core skills of leadership and management. Some researchers have taken a more extreme view, stating that management and leadership perform activities that are almost opposite in nature. For example, in 1990, John Kotter presented a framework for understanding key differences between leadership behaviour and management tasks. It was strongly argued by

Kotter that management tries to establish security and order, whereas leadership has the goal of promoting change and fluidity within organizations.

Kotter proposed that the main function of managers is to drive consistency, which in turn should lead to an efficient-running organization. However, leaders were determined by Kotter to do the converse to this, by seeking “continual adaptive change”. Kotter did not mean that leaders were looking for change for change’s sake, rather, in such unpredictable times continual change is required for an organization to even survive at all.

Some might think from these comments that Kotter was more of a supporter of leaders than managers, but in fact, Kotter felt that both management and leadership skills were essential in order to be able to drive success in organizations. According to Kotter, one cannot function without the other. Of great significance to this research, Kotter compared information on leadership behaviour and also presented information about management behaviour to compare the two and demonstrate the differences. The table below summarizes the differences between the different types of behaviour, as Kotter saw it. Some of these areas can indeed be described as being “opposites” where others show more of a difference in emphasis between the two types of behaviour.

**Figure 1: Management and Leadership Behaviour According to Kotter**

<b>Managers</b>	<b>Leaders</b>
Seeks order and consistency	Seeks change and movement
During planning and budgeting – establishes agendas, sets timetables and allocates resources.	Establishes a direction – looks at the big picture, clarifies the situation, creates a vision and determines strategies.
With relation to staffing – provides structure, job placements and defines rules and processes.	With relation to people – aligns people, communicates goals, builds teams, looks for commitment.
Focuses on control and the solving of issues by taking actions to correct issues, creating solutions and defining incentives to reward good	Focuses on motivating and inspiring people through empowerment, looking at how to satisfy unmet needs, and energising people.

work.	
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From reviewing the table above that is based on Kotter’s work, it can be seen that Kotter also places an emphasis on control for managers, but not for leaders. Rather, leaders are seen to provide inspiration and generate energy and enthusiasm, while managers on the other hand, focus on making sure that the organization continues to tick along in an efficient manner, and continually improving efficiency through definition of rules and processes, and so on. Kotter’s argument can be seen clearly by reviewing the table – of course, inspiration, motivation and energy drive employees to do their job, but individuals and teams also need to have structure, rules and procedures in place to be able to achieve this, thus the two functions go hand in hand to deliver success for organizations, and both skills are indeed required.

Other academics have also presented noteworthy papers on the similarities and differences between leadership and management. Bennis (1989) is one such author. Adapted from Murray (2010), the key differences that are presented between managers and leaders can again be reviewed in the table below:

**Figure 2: Management and Leadership Behaviour According to Bennis**

<b>Managers</b>	<b>Leaders</b>
The manager administers current ways of working.	The leader innovates to find new ways of working.
The manager copies what has been done before and is proven to be effective.	The leader provides original solutions that can be utilized.
The manager places emphasis on structure and systems in the organization.	The leader places emphasis on the people in the organization.
The manager deals with issues that are short term in nature.	The leader tends to focus on longer term problems that exist.
The manager will ask questions like “How?” and “When?”	The leader will ask questions like “What?” and “Why?”
The manager continually reviews the	The leader continually reviews the

bottom line.	horizon.
The manager sticks with the status quo and works within it.	The leader prefers to challenge the status quo.
The manager can best be described as a “classic good soldier”.	The leader can best be described as “his or her own person”.

While supportive of Kotter’s research in some ways, the work of Bennis does not particularly seem to espouse it in others. It seems to present a very black and white approach of what leaders and managers are, which in the real world of course may not be particularly accurate. Of course, it is likely that some people in key positions in organizations tend towards leadership skills as defined by Bennis, and some more towards management skills, however, it is unlikely that any one person fits well into the boxes of “leader” or “manager” that Bennis has provided.

In addition, at face value Bennis does not seem to support Kotter in the sense of supporting the idea that both sets of skills are needed within an organization. His work may be criticised in the sense that some aspects of it are clearly not accurate. For example, in real life organizational situations, it is not always just those in leadership positions that seek to change the status quo. Sometimes leaders, even good ones, want to retain the status quo because it suits them from a personal perspective – for example, if a leader has an excellent job with a great salary, and leads in every sense proposed by Bennis other than “challenging the status quo”. It can be argued then, that personal factors may also affect the behaviour of leaders and managers sometimes, and so the case that Bennis presents is too basic. To provide another example, it can be seen that those at lower levels within the organization may sometimes drive change – those not considered to be leaders, particularly at all. Dissatisfaction with the current situation and a desire to become more efficient (a supposed management skill rather than a leadership skill) can also drive change and lead to challenges of the status quo.

It may be seen then, that Bennis’s description of leaders and managers is too basic and does not take into account important considerations regarding the behaviour of people, rather, it tries to put leaders and managers in clear, distinct boxes that maybe do not really exist.

However, Bennis is not without his supporters. For example, Fenton (1990, p.113) states the following of leaders, which appears to support the work of Bennis with regard to leaders at least:

*"Leaders stand out by being different. They question assumption and are suspicious of tradition. They seek out the truth and make decisions based on fact, not prejudice. They have a preference for innovation."*

If it is assumed that Fenton was only referring to leaders, and not also to managers, then this statement seems to assert that managers do not necessarily seek out the truth, are not necessarily innovative and are happy to plod along with tradition, which again may be argued to be too simplistic of an approach.

Some authors argue that leadership and management should not be particularly separated out. Gosling and Mintzberg (2003) were proponents of this approach. This develops the theme of Kotter, since Gosling and Mintzberg detailed that for successful organizational development, both leadership and management skills are important. To support their theory, they proposed five mindsets of leadership, namely:

The reflective mindset – the idea behind this concept is that managers that are reflective can adjust their behaviour by reviewing it and implementing the appropriate changes that are needed.

The analytical mindset – this mindset provides in-depth analysis, rather than analysis that only scrapes the surface, and it includes reflection.

The worldly mindset – according to Gosling and Mintzberg this mindset involves understanding the environment in which the business is set, and also the different cultures involved.

The collaborative mindset – this idea focuses on the sense that opportunities can be found collaboration between people that can be leveraged for greater success. The theme is that everyone is responsible for taking a management approach in an organization, to drive success.

The action mindset – this mindset brings together the concepts that Kotter had distinguished as specific leadership and management features, of change and continuity. Gosling and Mintzberg argued that continuity is needed to understand when change must take place, and there has to be an appropriate level of balance. Whereas Kotter felt that driving change was a leadership function and building stability was a management function, Gosling and Mintzberg included these characteristics together in their “action mindset”, expecting that both leaders and managers would demonstrate this important characteristic.

Mintzberg and Gosling did not believe that these mindsets were hard and fast rules into which managers and leaders should slot, rather that they were somewhat fluid.

## Leadership versus Management



Rost (1993, p. 149) provides some interesting details relating to his view with regard to the differences between leadership and management, citing the following:

<b>Leadership</b>	<b>Management</b>
Influence relationship Leaders and followers Intend real changes Intended changes reflect mutual purposes	Authority relationship Managers and subordinates Produce and sell goods and/or services Goods/services result from coordinated activities

Rost explains that influence relationship versus authority relationship is an important distinction because these differ due to the use of coercion (or not). In his view, “influence” means that coercion should not be used, but he believes that “authority” will use it regularly to get things done. Interestingly, Rost describes how the leadership relationship is “multidirectional”. What this means is that leaders influence followers and followers influence leaders also, as well as leaders being able to influence other leaders, and followers influencing other followers. In management however, it is explained that the relationship is basically “top down” and there is little influence exerted aside from that. This is an interesting difference to consider.

In addition, Rost argues that with regard to the concept of leaders and followers versus managers and subordinates, it is explained that leaders are not the same as managers, but that followers can be managers, as can subordinates. It is described how being a leader does not automatically mean that person is in a position of authority, and indeed how this is often not the case.

Importantly, Rost explains that management is not bad and leadership is not good. It is described how ineffective, bad, mediocre leadership is still leadership and how bad, mediocre and ineffective management is still management, and that the same is true of good management or good leadership as well. However, despite this Rost’s theories do tend to suggest that leadership is good and management is bad, since, for example, not all managers are “autocratic” in decision-making. There are managers that also happen to be good leaders that are able to work in a collaborative way with their teams. In addition, it should be considered that in a crisis situation, a leader making an autocratic decision might be the right thing to do, for example, ordering everyone out of a building in the case of fire. In such situations where safety is concerned, arguably there is little room for collaborative leadership.



Ryan (2007, p. 2) adapted Kotter’s work on the differences between leadership and management, to develop the table below:

**Figure X: Model of leadership versus management**

	Management	Leadership
Direction	Planning and budgeting Keeping an eye on the bottom line.	Creating a vision and strategy Keeping an eye on the horizon.
Alignment	Organizing and staffing Directing and controlling Creating boundaries	Creating shared culture and values. Helping others grow Reduce boundaries
Relationships	Focus on task – produce/sell goods and services Based on a position of power Acting as a boss	Focus on people – inspiring and motivating followers Based on personal power Acting as a coach, facilitator, persuader
Personal qualities	Organizational skills Problem solving Telling Conformity	Strategic view Open mind Asking Innovation
Outcomes	Maintains stability	Creates change, often-radical change.

This brings some useful additions to help better understand the differences between leadership and management. However, Ryan does also point out “there is no single recipe for leadership”.

Ryan also states that in terms of alignment, leaders and managers should be concerned with the following activities:

<b>Leaders</b>	<b>Managers</b>
Defining the company values	Working towards alignment within their own work teams.
Creating a shared culture of behaviors	Communicating the values and making them a reality
Creating an organizational structure that fits with the needs of the future	Resourcing and recruiting people with the right skills for the future
Identifying key skills and attributes required for the future.	Ensuring that people develop skills needed in their current job.

Another leadership versus management theory is espoused by Zalenik (2004). It is described how leaders and managers are simply different kinds of individuals. Zalenik states that the goals of managers come from “necessities” but the goals of leaders come from a place of “active attitudes”. The concept behind this theory is that leaders will use their energy to inspire people to be creative about problem solving, but that managers make sure that the “organization’s day to day business gets done”, which may include telling people what to do, if necessary. Telling people what to do does not allow much scope for creativity. Zalenik argues that the creativity of leaders can sometimes be stifled by the need for order that is driven by managers, and that managers avoid risks, while leaders actively seek them out and take them. The report also considers how organizations have to develop both good managers and good leaders if they wish to succeed. This is consistent with much of the literature, and despite a tendency towards describing management skills as bad and leadership skills as good, it is generally assumed that both types of skills are needed for business success.

Pascale (1990) states that while managers think incrementally, leaders think radically.

What this is thought to mean is that managers stick to tried and tested methods, and tend to work within company policies and procedures, leaders will tend to follow their own direction, and that this may be of greater benefit to an organization in the longer term.

Predpall (1994) also discusses leadership and management. It is argued by Predpall that senior managers must “act as a role model”, which is perhaps a skill that both leaders and managers have to consistently demonstrate.

Some believe that leadership is just one of a range of abilities that good managers need, and/or vice versa. Managers are often thought to carry out the following tasks: organizing, planning, controlling and directing, but actually they are required to be able to lead to achieve this. Those arguing this idea may determine that leadership is a great skill to have but it is not necessarily essential to getting things done. The supporting evidence for this comes from the fact that groups may sometimes function very well without a leader, and do less well with a leader's involvement.

It is explained by Blagg and Young (2001) that the differences between good management and leaders are often discussed as;

*“Managers are thought to be the budgeters, the organizers, the controllers – the ants as one observer puts it – while leaders are the charismatic, big picture visionaries, the ones who change the whole ant farm”.*

Again, this is considered to be something of a trap, as it leads to people looking at the situation in a “bimodal” manner. Blagg and Young state that Kotter argued that people have some degree of both leadership skills and management skills in them, and the amount varies depending on the person. It is suggested therefore, that one of the best approaches is to rate people from one to ten for both leadership and management qualities. They explain how management skills are generally considered to be less important when using a bimodal approach, but when understanding that people have both leadership and management skills generally speaking, the concept of separating out the different kinds of skills for each can be useful. Blagg and Young are insistent that the most effective people tend to be those that have skills as both leaders and managers and who are able to balance these skills out, drawing on each as required in any given situation.

It is argued by Blagg and Young (2001) that one of the main differences between leadership and management is the supreme ability of leaders to communicate effectively. They believe that leaders spend a great deal of time communicating in order to drive success. These researchers also explain how being a good business leader also requires those leaders to be able to share uncomfortable truths effectively, because these help people to deal with change. Dealing with change is considered to be a primary role of leadership in the current business environment. It is also argued that in contrast, managers may try to keep things running smoothly rather than necessarily dealing with these unpalatable truths. Deciding between these two choices (dealing with uncomfortable truths or preferring to keep things running smoothly) may lead a company to either thrive or flounder, since not all

concerns can be expressed all of the time, if companies wish to be successful. Sometimes hard truths will not be appropriate, but other times they are necessary to drive change. Blagg and Young explain that Kotter distinguishes very well between the time to share hard truths and the time not to. He states that while sometimes these truths will have a demoralizing effect, other times they can lead to people taking action that will improve a particular situation. This is an interesting differentiator between leadership and management, but it does again tend to assume that managers cannot be leaders and vice versa, which is clearly not the case.

Menkes (2011) also discusses the truths that people have to face. He states that one of the problems is that the current approach to problem solving is to study a problem, create a tool to fix it and then conduct a study testing the correlation between the suggested solution and its effect. In his opinion, this breaks down issues into their varied component parts, and while this approach has “undeniable merits” it may also prevent people from seeing the all-important larger truths that may be at play. In his opinion, this method chops up that which it attempts to understand, and perhaps this is an important difference between leaders and managers.

Malik (2009, p. 38) explains a common issue that occurs when defining the differences between leadership and management skills, describing it as a peculiar pattern. It is explained that generally speaking everything that is considered to be:

*“Inferior and unacceptable, in the sense of being bureaucratic, non-innovative, non-dynamic, backward looking and so on, is allocated to the category of “management”. Everything that is considered to be good and desirable comes under the category of “leadership”.*

In Malik’s view, the problem with this is that all too frequently bad management is being compared with good leadership rather than good management being compared with good leadership and bad management being compared with bad leadership. He states that as a result of this it is essential to define the differences between good and bad management and also to determine the differences between good and bad leadership, otherwise good management and good leadership and bad management and bad leadership cannot be effectively compared with one another. Malik’s view raises a major flaw in the research relating to management and leadership skills, and this researcher will take care to ensure that bad management is not being compared with good leadership, so that genuine and useful conclusions can be drawn from the literature.

Ibarra (2012) raises an important point, which is that the skills that people have argued to be important in both leadership and management have changed over time. At the current time, the economic downturn has had an impact on the most recent research. For example, some researchers believe that the financial crisis has led to different leadership and management skills being required than in the past. Ibarra (2012) states that since the 2008 economic downturn, two quite different ideas about leadership have coexisted. One theme considers the current necessary leadership skills to be more decisive and oriented to crisis management than in the past, while the other approach believes that a command and control is antiquated and has led to lots of problems, and that this model should be replaced with collaboration and inclusive leadership. Ibarra states that leaders that are likely to be successful in the current times must both command and collaborate. It is likely that if all the research were reviewed in a chronological fashion, it would be seen that at different times, the situation in the world might have different influences on what are considered to be excellent leadership and management skills.

Kubicek (2011) goes further and states the case that leadership is dead because leaders too often abuse their positions. It is argued that the need for self-preservation is so strong in people that this has an impact on their influence and can lead to this abuse of power. Kubicek states that the ways in which leaders use their power is critical to leadership. It is reported that the best leaders use their abilities to liberate rather than to dominate. This may explain some of the differences between leadership and management. After all, managers are to some degree expected to “dominate”. They have to control and organize, both activities that may be perceived as dominating to some. Kubicek’s view is interesting, but it is felt by this researcher that the debate over leadership and management skills is likely to continue, and so leadership is unlikely to be “dead”, rather, it is just different than it has been in the past.

One of the biggest challenges with these distinctions is that many of them do not seem to take into account that most individuals that are required to be leaders are also managers. This means that both sets of skills are most definitely required, and while the assumption often seems to be that leadership is somehow “better” than management, without management skills in the team the organization will be just as likely to fail as if it does not have leadership skills. It is also necessary to bear in mind that the needs of different leaders and managers will vary in terms of leadership and management development, particularly during different stages of their careers. For example, in the early stages of leadership development, perhaps having a strategic vision is not so important as being able to get the team to follow

and do what is required to deliver the business needs. Understanding the broad business market may also not be particularly necessary at this stage. Later on it may be considerably more important to have strategic vision, especially when the individual reaches the upper echelons of an organization. Additionally, at later stages, when a person is part of the core leadership team in an organization, understanding what is going on in the business environment will be absolutely critical to business success.

Like Kotter, some academics do view leadership and management as complementary. Evidence of this has also been presented in research from time to time. For example, in a recent review of leadership effectiveness, Boatman et al. (2011) writing on talent management for the DDI with Hamel, stated that organizations with effective management cultures were 2.5 times more likely to have leaders that were passionate. This clearly ties together leadership and management skills into one place and demonstrates the important of each to the other.

One interesting point of view that some purport is that, the difference between leadership and management sometimes comes down to the use of emotions. Boyatzis and McKee (2005) are classic proponents of this approach. It is argued by these researchers that leaders that the main problem is that leaders know the “what” of must be done, namely the strategy, implementation, management and control, but many people do not really understand the “how” of leadership. Boyatzis and McKee state a case for resonant leaders, arguing that such leaders are able to guide emotions and passion and that this helps to “paint compelling pictures” that can be used to inspire subordinates. It is explained by Boyatzis and McKee that conversely, managers are often not able to understand the importance of emotions in good leadership. These researchers describe how emotions are catching and that if a leader is experiencing a particular emotion then this can rub off on others too, if the leader is good at what he or she does. They also state that good leaders understand this and use emotional intelligence to drive the moods and performance of their teams, while managers do not necessarily understand this concept. This theory again tends to fall into the trap that Malik highlights (above) of seeing leadership as good and management as bad and not necessarily acknowledging that managers may have leadership skills, and leaders, management skills.

Lawrence (2010) concurs to some degree with Boyatzis and McKee (2005), explaining that all leadership is associated with relationships with other people. In this case then, these relationships must be based on emotions and feelings, as

Boyatzis and McKee argue. This is in contrast to the planning and controlling aspects of management; tasks that do not tend to have feelings or emotions concerned with them particularly.

Heskett (2007) believes that with successful leadership, much is down to timing and circumstances, or the “when and where”. He explains that leaders use theater to make people feel comfortable. Pep talks given during periods of change are provided as an example of this behaviour. It is described how a balance of control, delegation and theater makes a leader a good one. Again, this tends to assume that managers are not able to use theater, but this is unlikely to be the case.

In an interesting book on the subject of leadership and management, Kouzes and Posner (1989) put forward the idea that change has led to traditional ideas of management and leadership breaking down. For example, according to them, the traditional idea of management is that an organization is orderly and stable, but in fact as has been seen over the past decades, organizations are continually changing, and it is arguably only those that change that can survive in the longer term. In addition, they present the idea that traditionally with management, people tend to look at the short term, while good leaders will look ahead towards the longer term. Of particular interest is the idea that managers ought to be “cool and aloof” and that leaders display emotions and feelings. This is particularly interesting as it supports the work of Boyatzis and McKee (2005) detailed above.

Kotter (1990, p. 36) explains the importance of the planning process in leadership and how planning should not be confused as a leadership activity, but is a management task, stating that:

*“Even the very best planning possible is not the same as leadership—or more precisely, the direction-setting aspect of leadership. Nor is it a replacement or substitute for leadership”.*

It is described how leaders that have a vision and direction do not produce plans – they describe how organizations need to become in order to succeed. Interestingly, managers may have a good understanding of how the skills for leadership are different from those for management and which are important. For example, Johnson (2005) found in a study of health care managers that those skills traditionally rated as “management skills” such as technical skills were not rated as being as important for management by managers as skills such as the ability to have vision and set goals. The ability to follow through on plans and visions was considered to be most important by those managers. Kotter would likely put the

following through on plans into a box of skills for managers rather than leaders, but it may also be argued that leaders that are unable to follow up on plans and visions are unlikely to be very good leaders.

One challenge that has been identified in the UK that may well hold true elsewhere in the world is that in 2004, the DTI published a report in that reviewed inspirational leadership compared with management. It was argued that there is often a gap in the UK between management and inspirational leadership, and that due to the volume of change more inspiration is needed than ever before in leadership. It is also determined however, that organizations need strong management skills, so once again, and both skills are seen to be complementary to one another. One worrying trend uncovered was that 50% of managers had not managed to adopt the leadership skills of high performance workplaces, and that command and control was all too common rather than inspirational leadership. In a survey carried out, it was shown that management by walking around was a technique that was appreciated while listening and not actually doing anything about the issues that may exist was not.

### *Analysis of Findings*





Having reviewed the literature as it relates to leadership and management skills, it is important to understand the main findings from the research, and to analyze any patterns that run through the literature. This section tackles this area, exploring the themes that emerge from the studies reviewed.

Reviewing the literature in the most basic of manners, the following findings emerged with regard to the differentiations between leadership and management skills. Leaders were commonly defined as being those that have vision and a desire to change and remold the organization to fit its unique and also changeable business environment. They were considered to be inspirational, drawing others in with their charisma, and taking followers with them.

Conversely, managers were usually described as being those that plan, budget and control. They were not seen as being visionary or as those that define a need for change. Instead they were demonstrated as being those that maintain current structures and make those into a success with the resources available. They were portrayed as being individuals that take the vision and objectives of the leadership team, and make it happen by using control mechanisms, among others to reach the pre-defined targets.

The findings of the research demonstrate that in many cases, management and leadership thinkers have taken what might only be described as a rather polarized view of “management skills” compared with “leadership skills”. One of the themes that appears to run throughout the literature is that management seems to be considered as somehow less important than leadership. In comparing the two types of skills, many researchers seem to fall into a trap of assuming that management is “bad” and leadership is “good”. Of course, this is not the case. As Kotter (1990) clearly explained, both are absolutely necessary in order for organizations to be successful in their endeavors.

As a generalization of the literature, leaders are frequently considered to be visionary and those that drive change. Conversely, managers are viewed as those that plan, monitor and control. Clearly, both types of skills are essential for businesses to be able to succeed. Without vision, an organization cannot see where it is supposed to go. Without change, the same organization will not be able to determine how to reach its vision. In addition, organizations must continue to change and grow in order to survive in the longer term. Maintaining stasis and not moving forward is a problem that can bring organizations down. However, without the down-to-earth activities of planning and control, the business will also not be

able to achieve its goals, as the vision may continue to change and adapt without the organization ever catching up and achieving its goals.

Another theme that appeared throughout the literature review was somewhat of a sense that people are either managers or leaders, but not both. This can be contested, since some of those that have skills that might be considered to be “management” skills also have some skills that are categorized as “leadership” skills, and vice versa. Because someone is good at planning does not mean that they cannot also be a visionary. The literature tends to put people in clearly defined boxes that in real life, with real personalities, simply do not exist. There is no reason why someone that is able to drive change is not also able to monitor how that change is progressing. The research reviewed however, tends to make the false assumption that this is not actually possible, which clearly does not take into account the wide range of different personalities, skills and abilities that exist in different work places.

Importantly, it is necessary to bear in mind the work of Malik (2009) who made the remarks about how bad managers are often compared against good leaders. Defining good and bad managers and good and bad leaders allows a better comparison between good leaders and good managers and bad leaders and bad managers. A great deal of the research appears to have been based around a lack of understanding of this key point. It might for example, be argued that a good manager needs to be visionary as well as have planning, controlling and monitoring skills. To date, this appears to be an important and critical limitation of the literature and research in this subject area.

In terms of management and leadership training and development needs, one of the most important findings was perhaps that these requirements vary throughout a person’s leadership or management career. In the early stages of a person’s career it was found that a greater degree of management skills are needed to monitor and control team output, in addition to fine-tuning processes to deliver results more efficiently. However, the later stages of a person’s career, a greater emphasis was found to be on the skills of vision and encouraging followers to move towards that shared vision, changing the organization to achieve shared goals.

This is an important consideration that will have to be utilized when developing a training plan for leadership and management skills at Prime Funds. Those in the earlier stages of their careers may display the need for different types of development than those at later stages. It is likely that a “one size fits all” approach will not be appropriate across the board for all Prime Funds leadership and

management employees. Each individual will need a skills gap analysis assessment, which is relevant to their own job description and stage of their career. This will then need to be examined to determine the most important skills that can help the individual to develop in the way that the organization (and the individual) need at that time. Personal Development Plans (PDPs) may be of great importance in achieving the analysis required to produce a training plan that will meet the needs of both the organization and the individual.

Equally important, the organization may require different skills at different times during its lifecycle. When the company is mature, it may need more skills in terms of planning and control to keep it on track. When the company is a start up however, it may be more important for a strong sense of vision to be driven throughout the company. This should also be considered when creating the management and leadership training and development plan.

In fact, taking these points one stage further, it might be argued that the individual role drives the types of skills that are required, not just the phase of the person's career, nor the lifecycle stage of the company itself. Different jobs require a variety of different skills, and these may or may not be leadership or management skills. For example, a designer requires a level of vision to be able to portray a company's brand in an artistic manner. That does not necessarily make that person into a leader; it perhaps just means that they are a good designer. Each position should perhaps then be considered on its own merits.

In addition to all of this, leadership and management skills may also be considered to be "good" or "bad" in different, very specific situations. For example, while in defining a new goal, collaboration and getting people on side by building up relationships may be particularly useful, and may require more so-called "leadership skills", in a crisis situation, "management" skills of directing and telling people what to do by taking charge of the situation may be more important. For example, if there is a fire in a building, it may be highly inappropriate, and in fact dangerous for a leader to ask his or her team "What do you think we should do to resolve this issue?" A more typically "management" style of doing things, such as telling people what to do to get out of the building in time to save lives may be far more appropriate. Each situation merits its own specific set of skills, abilities and necessary behaviours and a talented employee will arguably be able to select the best for the circumstances faced.

Overall, it has been demonstrated that the skills of leadership and management are both absolutely essential in building up a successful business that is able to achieve

its goals. Vision is needed to define the best direction, but planning and monitoring are equally as critical to make sure that the organization stays on track in getting to the vision. In addition, the leadership ability of driving change is essential to understanding when change is needed (as a result of the management skill of monitoring) and steering the business onto a different course when the current one is not working. Different skills are needed in different sets of circumstances, and the most successful organizations are likely to be those that can differentiate between what is needed and when.

Having analyzed the differences in the literature between leadership and management skills, this research now moves on to understanding how management and leadership development plans are created, and the types of activities that need to be undertaken in order to bring different individuals up to the standard required to succeed in both types of skill areas, dependent on their specific skills and abilities, and those required of them in the job.

### *Leadership and Management Training and Development*

Having reviewed the literature that describes the different skills for leadership and management and analyzing the differences between them, along with patterns identified, this report now moves on to understanding how leadership and management training can be best carried out. One of the major outcomes of this research is to be a plan for management and leadership development for Prime Funds, so understanding the literature on leadership and management training and development is critical to this task. It is necessary to understand how best to construct a plan for leadership and development, and the pitfalls to be avoided, as well as important considerations that must be included for the leadership and management development plan to be a success at Prime Funds. Since both leadership and management skills are important for an organization to be able to succeed, making sure that both are covered in any training that is provided will be key to developing an effective program for leaders and managers at Prime Funds.

Bolden (2007) describes how management and executive education is an important business, and that \$50 billion a year is spend on leadership development. Bolden explains that leadership and management development are both similar and different at the same time. It is argued that management development furnishes

managers with the knowledge, skills and ability to enhance performance by dealing with “known tasks” by using proven solutions. It is specified that leadership development however, is helping leaders to build abilities in “anticipating unforeseen challenges”.

Some researchers describe how cutting of operating costs often leads to cutting back on training, including management and leadership training. Bryan and Hulme (2003) describe how this cutting back of costs has often gone too far. It may include cutting back on essential training. In the view of Bryan and Hulme, cut backs in this way only lead to lost revenues and higher costs. Cooper (1997) agrees with this viewpoint. Ridderstrale and Nordstrom (2002) state that the problem is that organizations are now significantly flatter than in the past, and the middle is often “torn out” in order to flatten the organization. They argue that this can lead to “seniles managing juveniles”. Ridderstrale and Nordstrom explain how some of the most important people in the organization sit in the middle. They call this the “critical middle”. Additionally, Collins (2001) found that leaders from the outside of a company were less likely to be able to transform a company from good to great. All of this leads to the perspective that cost cutting may be useful in the short term, but in the longer term, management and leadership training and development are essential to healthy, well-run organizations.

In addition to this, people management practices have been found to have a direct impact on productivity and profitability of each employee. A report by the Chartered Institute of Personnel Development (2001) in the UK found that improvements in productivity of 18% and profitability of 19% could be achieved by better people management practices. This demonstrates the very significant monetary value that can be placed on management and leadership training in organizations.

Drucker (1999) argues that success in the knowledge economy comes to those who know their strengths and development areas; however, this can be very challenging for people to be able to achieve. One issue that everyone has, but which becomes a greater issue when people move into leadership and management positions, is the so-called “blind spot”. This can also be a huge issue for training of managers and leaders, and has to be addressed for development to be effective. Cook and Macaulay (1993) describe the Johari Window as having four areas of knowledge:

- Arena – development areas that are known to the person and to others also.
- Façade – development areas that are known to the person, but they keep these hidden from others.

- Blind spot – development areas that are not known to the person, but are known to others.
- Unknown – development areas that are not known to the person and not known to others either.

Blind spot areas can be addressed by training, but only if the person being trained acknowledges that there is a problem. Pascale (1991) states that “the problem with mindsets is that we tend to see through them, and so the degree to which they filter our perception goes unrecognized”. This means that training of leaders and managers can be challenging if they have a blind spot and they do not recognize that an issue exists with their mindset.

Chance (1989) states that the most important figure in the transition to a team organisation (from a traditional command and deliver) organisation is the front-line supervisor. The team transition from moderate performance to high performance will be dependent on the ability and willingness of leaders and managers to perform her new role. In addition, Adair (1998) discusses the ‘Peter Principle’ whereby it is considered that people are generally promoted to their level of incompetence. Individuals can be good at one level, but less able to perform at the next level. For organizational success, it is necessary to be able to get leaders and managers to understand the changes that are needed to their behaviour and working styles in order to leverage the benefits that will come from this.

Training of leaders and managers can occur in a number of different ways. Walton (1999) described how learning and development may happen in a variety of different manners, some of which may be intentional, but many may be accidental, also

In terms of developing suitable leadership development plans, it may be helpful to review the research of Griffin (2003). Griffin observed that there are four types of individuals on management development programs:

- The reluctant leader (20% of attendees)
- The arrogant leader (10% of attendees)
- The unknown leader (25% of attendees)
- The workaholic (45% of attendees)

One of the most challenging types of leaders/managers to develop is the “arrogant leader”. Griffin states that in developing these, a “rude awakening” may be

required, and that this may have to be given in the form of tough feedback, helping the individual to become more empathetic, and even considering demotion or dismissal in some cases. The issue of arrogant leadership is closely linked to the problem of the blind spot, in that arrogant leaders do not necessarily see that they have problems to be dealt with by training and development. One highly effective leadership development technique that can be useful in tackling this problem is 360-degree feedback. This is recommended by Griffin as an approach to develop leaders and managers. Kerr (2002) argues that most individuals have information that would make their boss more competent but say nothing due to the risk. 360-degree feedback to some extent reduces this risk for employees. One of the most important factors in modifying and developing the behavior of leaders and managers is helping them to understand that they need to develop. Siddons (2001) argues that employees need to think that it is their choice to develop in order for leadership and management training programs to be in any way effective.

Many companies offer their own in-house leadership courses. Hsieh and Barton (1995) state that home-grown training courses are useful for stimulating individuals to become better leaders, however, for small organizations like Prime Funds, this is not really a feasible option. Coaching however could be a good option, though some leaders may require some training in how to become an effective coach. Unfortunately, while Longenecker and Pinkel (1997) argue that workplaces are encouraging managers to become more proactive coaches, in fact many organizations do not really provide much support to help their leaders learn how to coach.

According to Whitmore (2002), coaching requires effective questioning and active listening. He advocates the GROW method of coaching:

**Goal:** What do you want?

**Reality:** What is happening?

**Options:** What could you do?

**Will:** What will you do?

An important aspect of creating leadership and management development programs is raised by Senge et al. (1994), who described how most people have a preference for learning in a specific way. Also, some training and development needs should be dealt with more urgently than others, and of course, cost is also a factor that has to be worked into the process of defining good management and leadership training programs. Siddons (2001) describes some of the different types

of training and development approaches, along with the time and other resources that are required to develop individuals. These are shown in the table below:

**Figure X. Methodology, timescales and resources needed for development solutions (adapted from Siddons, 2001, pg 13)**

<b>Methodology</b>	<b>Timescales Fast = a few days Medium = a few weeks</b>	<b>Resources needed (in terms of you or your team's involvement)</b>
Feedback	Fast	High
Formal training courses	Fast	High
Role play	Fast	High
Coaching	Fast	High

This indicates that time and other resources need to be considered when developing a training plan for Prime Funds' leaders and managers.

Adair (1998) explains that it is unfair to place someone into a leadership role, without providing them any training that helps them to work in their new role. In addition, Torrington et al. (2002) describe how development issues should be considered a significant part of any strategy formulation. In reviewing this theme, Sloman (2003) argues that whilst organizational and individual learning have now been accepted as critical to competitive advantage, time to spend carrying out these activities has become very limited – this is likely to be even truer at the current time, given the cost cutting exercises that have taken place during the economic downturn. This leads, all too often to leadership and management training being “telling” rather than other methods. Whitman (2002, p. 22) explains that just telling is not a sufficient route to management or leadership training. The figures in the table below illustrate why.

**Figure X: Recall (Whitmore, 2002)**

	<b>Told</b>	<b>Told and shown</b>	<b>Told, shown and</b>
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			<b>experienced</b>
<b>Recall after 3 weeks</b>	70%	72%	85%
<b>Recall after 3 months</b>	10%	32%	65%

Due to operational pressures, Prime Funds’ training has sometimes deteriorated into “telling” rather than helping leaders and managers to experience things for themselves, and thus giving them less opportunity for good recall in the longer term. This is an issue that will have to be addressed when preparing the training and development plan.

One key issue with leadership and management training is identified to be follow-up (Torrington et al., 2002). If development is not followed up on the chances of its success are considerably less likely. Development plans need to have clear targets documented, as Adair (1996) argues that ‘progress motivates’.

Ryan (2007) explains that one of the greatest challenges with developing leaders is the tendency that managers have to focus on the day-to-day and not look ahead or thinking about the wider market. This is an issue that will likely need to be addressed in the leadership and management development plan that is produced for Prime Funds. In addition, Ryan makes some important distinctions between types of leaders, which should be considered when preparing the development plan. Ryan explains that not all leaders are at the same point, and that their needs are different in terms of development. A “simplistic” view provided explains that there are:

1. Potential leaders
2. Middle managers
3. Senior leaders

It is explained that potential leaders are usually young people with high potential that are in the first few years of their working lives. This group does not yet have good technical skills, usually, and so they need to have excellent interpersonal skills. Ryan states that middle managers are those with the toughest job, because

they are required to be excellent managers but also to have leadership skills. They have to be able to balance the needs of their teams and those of senior leaders. This group usually needs to develop their strategic thinking skills. Senior leaders on the other hand usually have good technical skills, and are sometimes not very good at delegating, so that they are able to put their energies into creating a culture of performance, and driving change. The challenge with this group is that it can be hard to tell them that they need development, in addition to the fact that they may not like divulging their weaknesses openly.

The plan for training and development at Prime Funds will take this into account, as all three layers of leadership can be observed at the company. While as Ryan explains, this model is simplistic, it does offer a means by which to distinguish between the different levels of leadership in order to be able to provide development solutions for people at different stages of their career.

Gold et al. (2010) explain how different managers and leaders have different learning preferences. This should be reflected in the leadership and management development plans that are introduced for each person. They also describe the work of Bandura on the Social Learning theory. This model shows a link between a person's behavior, their psychological processes, and the environment. Gold et al. explain how people are able to learn by modeling what others do, in effect copying what they do when they see value in an approach that is taken. It is also described how people sometimes do not have self-belief, and so they do not use the new skill that they have learned when they feel this way.

In terms of leadership and management development, Gold et al. (2010, p. 273) state that:

*“Managers and leaders need to be prepared for what they will do, how to recognize success, and very importantly, how to deal with setbacks. Managers and leaders can be encouraged and persuaded to keep trying but experience of success is the most powerful source of completing learning and raising self-efficacy”.*

Rothstein and Burke (2010) discuss at length the requirement for both managers and leaders to have excellent interpersonal skills, and this should form an important part of any developmental training that is introduced at Prime Funds. They state that interpersonal skills are required for the following reasons: engaging others; providing positive feedback; effective speaking; listening; negotiating; conflict management and more. However, one issue that they identify is that while there are a lot of programs to develop the interpersonal skills of leaders, there has

been “little systematic evaluation of these programs”, meaning that it is unclear if they are effective or not, and if so, how effective. It is described how evaluation of these programs has shown that gains may not be that large in terms of changes to behavior. One of the problems indicated is the issue of willingness to learn – not everyone on a training course wishes to take on board the information that they are given. In addition, it is thought that some people cannot develop too much further in terms of interpersonal skills.

Kubr and Prokopenko (1989) also comment on the way in which it is decided that training will be provided. It is explained that senior management often decide who will get training and what the training and development needs are. These researchers also describe how development initiatives are usually reactive rather than proactive. They argue that while it is logical that top managers run organizations and so are best placed to determine the training needs of individuals, the problem is that actually they may not get these right. Reviewing this, it may seem that the individual is therefore best placed to determine their own training needs, however, due to the problem of the blind spot that has been identified, this is not always the case, as some people may well not acknowledge that they have certain training and development needs.

In summary, leadership and management development plans require a great deal of planning and analysis to make sure that they deliver the desired outcomes. Different styles of learning and varied levels of ability need to be considered to ensure that the training and development will be able to fill the gaps identified. The development plan is likely to be different for each person, with commonalities identified in different groups of skills that may be lacking between individuals – for example, a lack of an ability to delegate. It is also important that individuals are able to embrace the need to learn, develop and grow, perhaps by removing any worrisome blind spots that may exist before commencing on the building of a development plan.

# Devising a Training and Development Plan for Prime Funds



As identified in the preceding analysis, determining a training and development plan to address leadership and management skills gaps that exist in Prime Funds will be essential to dealing with those gaps and improving the organization's chances of success in the longer term. This section explains how this plan will be implemented by outlining the approach, before describing the specifics of the types of management and leadership skills that will be focused on. These have been selected on the basis of the literature review and subsequent analysis that was performed.

## *The Training and Development Approach*

Defining a clear process to follow will ensure that the training and development is carried out in a very consistent manner, that all gaps are identified (as far as possible) and that action is taken to address any issues that exist in comparison with existing job descriptions and vision and direction that the organization wishes to take in the future. It is felt that by defining a robust process and approach to implementing management and leadership development at the organization it will be possible to detect as many issues as possible, and to fill gaps.

The process that is to be followed is planned to consist of the following stages:

1. Update Roles and Responsibilities
2. Identify Blind Spots
3. Pinpoint Development Areas
4. Select Training and Development Opportunities
5. Monitor Progress and Measure Success

All of these are now expanded in greater detail.

### *Update Roles and Responsibilities*

The management team has a clear vision of where it wishes the business to be in three years from now. Roles and responsibilities were defined at the same time as this vision, in order to make sure that the business would be able to achieve its objectives with the resources (people) that it currently has in place. Since this activity was carried out several months ago, it is necessary for these roles and responsibilities to be updated, to make sure that there are no gaps, and that the people in the roles do have the ability to reach their full potential. While this is something of a house keeping exercise, the organization is still very much in “start up” mode, and so it is important to make sure that nothing has changed since roles and responsibilities were defined.

This stage will involve reviewing the documentation, making sure that each individual has the job description and requirements appropriate to their role and asking them to review it for gaps that they consider that they have also. It will also be requested that line managers do the same thing. In addition, individuals and their line managers will be asked to identify any responsibilities that do not

currently appear on their job description that they have taken on. This should ensure that all practical aspects of what the business requires are documented in at least one person's job description.

The management team will review the final job descriptions to make sure that no roles and responsibilities have fallen through the gaps, and if they have, to assign them to the appropriate individual.

### *Identify Blind Spots*

It is thought to be critical that identifying blind spots and encouraging people to address these is essential to the process of acceptance that change is needed. To deal with this problem, 360-degree feedback will be implemented throughout the team. Each individual will be asked to complete a questionnaire about his or her perceived abilities. They will then ask five other individuals to complete the questionnaire about them also. The results will be collated and the individual's strengths and developments will be drawn out via computer analysis that is calculated automatically.

While it is acknowledged that identifying blind spots does not necessarily mean that the individuals will accept that the issues exist with their development, it does make it considerably more likely than them just being told. If a development area is identified by several of those giving 360-degree feedback to the person, then it is going to be challenging for the recipient of the feedback to deny that the issue exists.

The individual will be given time to consider the issues that have been identified, and to reflect on them. The line manager will also receive a copy of the individual's 360-degree feedback report, on which to base their personal development plan.

### *Pinpoint Development Areas*

Following the updating of roles and responsibilities in addition to identifying each individual's blind spots, the line manager and the individual will meet to determine the exact development areas that must be addressed by each person, to bring their

management and/or leadership skills up to the required level for the position that they are in at the organization.

This meeting will be conducted in a similar manner to a performance appraisal, with both the individual and the manager identifying leadership and management skills for which the person is capable, as well as looking at areas that can be improved on. A form will be completed by both sides before the one to one meeting. Both the individual and the manager will also consider the outcome of the 360-degree feedback report of the individual and how this potentially might feed into training and development requirements.

At the meeting, the line manager and the individual will go through the form that they have both completed to identify gaps that they can both agree on. Where there is conflict between the two regarding the gaps that might exist, the 360-feedback can be referred to, and used to determine if indeed gaps do or do not exist.

After gap analysis has been completed, the line manager and the individual will complete a personal development plan (PDP) which identifies each leadership and management skill that needs to be attained and set a timeframe within which a training or development activity must be undertaken to fill the gap that exists.

### *Select Training and Development Opportunities*

The management team in conjunction with HR will review the different leadership and management gaps that have been identified on each person's personal development plan (PDP). Human Resources will also analyze the data collected both in terms of the 360-degree feedback and each person's job description to determine any additional training and development needs that may exist.

Following this, the Human Resources representative will source training courses, books, coaching and other activities that will help individuals to fill their training gaps. In some cases a training course offsite may be the best way by which to achieve this. In other cases, coaching or mentoring, or further on the job training may be appropriate.

The Human Resources representative will then create an overall training and development plan for leaders and managers in the organization that will address the training and development needs of individuals, as identified by the individuals,

their line managers and 360 degree feedback. The budget will be approved with the senior management team and individuals will be advised of the training and development opportunities that they will be getting. It will also be explained how this is of critical importance to the organization.

### *Monitor Progress and Measure Success*

Critical to the success of any project is monitoring its progress and keeping it on track. This will be achieved through both line management review of the progress of individuals towards filling the gaps that were identified in the personal development plans, as well as by the individuals themselves.

This will be complemented by a mentor system. Each leader or manager will be assigned a mentor who will not be their line manager, whom they can bounce ideas off and review issues that have arisen with. This will help to address any gaps that have not been effectively addressed through formal training and development opportunities that each person was assigned, such as training courses.

## **Specific Management and Leadership Skills for Training and Development**

This section reviews the management and leadership skills that Prime Funds is going to specifically focus on developing within the organization to achieve success with its people in the longer term.

Having reviewed the literature and research in this area, the table below demonstrates the specific management and leadership skills that will be required at Prime Funds, and how these skills will be developed at the organization.

On the most basic level, it has been determined that the managers in the organization do need training and development in the tasks that are traditionally considered to be the remit of managers, based on the literature review of the research that was carried out. In particular, the focus of the management training that will be carried out will be on planning, scheduling, forecasting and managing



and monitoring performance of team members. This will mean that the managers should be in a better position to be able to operate in a more empowered manner and with less leadership input into day-to-day operational issues that arise.

The goal of the training and development plan for managers is also to put in place more structure and formality in terms of performance management, goal setting and gap analysis in terms of personal development plans. It is recognized that as Prime Funds moves from being a start up organization to a more established, mature entity, this sort of structure and formality will be necessary to develop a more focused culture of success. Since managers are more functional within the organization, making sure that the workload gets performed on good time, and to budget, it was felt that after reviewing the literature, and understanding the current development gaps in the organization, that this would be the most effective plan.

The management development plan dovetails into the leadership development plan. Again, those tasks that were frequently considered to be leadership tasks in the literature, by Kotter and others, are those that tended to be identified as areas of development need for the senior leadership team. Of fundamental importance it has been noted that the vision and strategy for the organization is currently in a process of flux as the company moves from start-up mode into being a more established player in the industry. This will require a slight change of culture and focus, and towards more formality in the organization. This will need to be driven by change management, and this will be an important area of focus in development for the senior leadership team. Driving this change will be critical to the success of the organization, hence the importance assigned to this area. In the leadership development plan, efforts will also be focused on helping the team to develop better communication skills that are more appropriate to their level within the organization, as well as learning how to scan the business environment to understand the potential impact of any changes that may occur.

As in any organization, resources are limited, and so it will be important to keep within a set, predefined budget in delivering the development plan to the employees that have been identified for development. Six individuals have been earmarked for training. Three of these are from the senior leadership team and three are junior managers within the organization. To keep costs down, the Human Resources Manager, who has a background in some types of training and development, will create training programs for some areas. These will be restricted to areas that the Human Resources Manager has identified feeling comfortable and experienced in. In addition, in some instances, members of the senior leadership team will create parts of the development program, teaching in their areas of

specific expertise. One such example is budgeting, which will be taught to junior managers by a member of the senior leadership team.

Of importance, an executive consultant and leadership coach will be hired to deliver some of the training and development to the senior leadership team. The goal here will be for this person to take an objective look at the ways in which vision and strategy are currently defined, and to help the senior leadership team to introduce more structure and formality into these important areas. While an executive coach and consultant will be a significant expense for the organization, it is felt that without the skills defined in the table for leaders, the organization may not survive. This means that the expense paid for this training and development will be likely to be money well spent. The coach will be identified for his/her ability in improving performance in senior management teams, ideally in the finance industry. The Human Resources Manager will be responsible for the short listing of candidates for this role, and the leadership team will together select the person that they feel that they can work with the best.

	<b>Skill</b>	<b>How Skill Will Be Developed</b>
<b>Management Skills</b>	Managing budgets	One gap that has been identified among the managers at Prime Funds is a limited ability in terms of being able to forecast and manage budgets effectively. This has led to significantly under predicting of funds that would be required and an inability to forecast effectively. In addition, managers have not been very good at controlling spending in their teams, a core function of management. One member of the leadership team has an accountancy background and will train this function in to the line management team for those that will have responsibility for budgets in the organization. Success or otherwise will be measured in terms of deviation from budgets each quarter, following the training.
	Planning and Scheduling Resources	It has become obvious to the senior leadership team that planning and scheduling of employees has been a challenge for junior managers, who have not been planning in a way that allows for contingency. This has led to not enough team members being available to meet with clients or

		<p>contractors at certain times, especially during the summer months, and it has had a detrimental impact on company reputation on one occasion. Since planning is such an important management function, the senior leadership team will define exactly how many people must be in the office to manage clients and contractors at any one time. Once expectations are set, the Human Resources Manager will train the managers in how to schedule resources effectively. Success will be measured by there being sufficient people in the office at all times to handle client and contractor needs, and can also be measured by making sure that junior managers are sticking to the targets set for them for number of team members in the office at any one time.</p>
	<p>Setting Objectives</p>	<p>A workshop will be run on how to set SMART objectives with managers. SMART objectives are Specific, Measurable, Achievable, Realistic and with a Timeframe. The goal of this will be to show the managers how to take the organizational strategy from the leadership team and make it relevant to the individual member of staff through objectives that can be met. The Human Resources Manager will lead these training sessions which will be held in house. Success will be measured by the Human Resources Manager reviewing set objectives for individuals to determine how SMART they are, in conjunction with the line manager setting them, and their line manager also.</p>
	<p>Performance Management</p>	<p>Performance Management is always critical in driving results in organizations. As Prime Funds becomes bigger over the coming months and years, this will be even more important, and greater structure will need to be put into place to make sure that all members of staff have solid objectives and that their output and behavior is managed. The goal will be a hard working, high-performance team where everybody's input</p>

		counts. Since the leadership team has significant experience in performance management, each leader will provide coaching to his/her subordinates. This will be coordinated by Human Resources, and the HR Manager will follow up to make sure that everyone has had the desired level of training, and that this training has been consistent. Success will be measured by reviewing how well the process is operating in one year's time, and how well everyone is operating as a team.
	Developing PDPs	Equally important as managing performance will be developing personal development plans for employees to make sure that everyone has the right tools in terms of skills to carry out their assigned tasks to an extremely high standard. Line managers will receive coaching from an outside coach who specializes in understanding personal development needs of different employees. Line managers will receive help in identifying training needs, and developing an effective plan of how those needs can be met, while continuing to keep the business operating effectively at the same time. To back up this training, the Human Resources Manager will create a personal development plan template. Success will be measured by reviewing the number of gaps in training that still remains after six months and one year. The Human Resources Manager will carry out the gap analyses.
<b>Leadership Skills</b>	Developing vision	Developing a clear vision has been defined in the literature as being one of the most important functions of leadership. An executive coach will be hired to work with the management team to update the vision and five-year plan for Prime Funds. This process will include the sharing of tools and techniques for developing an effective vision, and how to communicate this across the organization in a way that can be understood by employees at all levels.

	Leadership communication	Leadership communication has been identified, as a core skill required of the senior leadership team in any organization. Because Prime Funds has grown from a small start up organization and now is becoming more established, methods of communicating vision and strategy have typically been informal. This needs to now develop and change, so that the leadership team is seen to be less as friends with everyone in the team, and more, a professional leadership team that has the skills and abilities to lead the team forward. The leadership team does want to remain approachable however; it also wishes to establish a more professional mode of operation in the business. It is thought that changing behaviors of communication will be critical to this transformation.
	Defining strategy	Defining strategic direction was a leadership skill that was identified as being critical to excellent leadership. This training will be carried out in conjunction with the training into developing vision, by an executive coach that will work with the senior leadership team to establish the company's amended strategy. The goal will be that the senior leadership team understands not just how to develop a vision, but also how that can translate into a strategy that can be worked towards at all levels of the organization.
	Leading change	It is envisaged that over the coming months, as Prime Funds prepares to work towards its medium term to longer term strategy, significant change will have to occur in the organization. In particular, as the organization changes and develops from a start-up company into a more established firm, the skills that are needed and the culture to get these things done will need to change and improve. This means that the behavior of team members at all levels may need to change. A training course will be sourced from an external provide regarding the importance of

		leading change effectively and how this is done. This will be followed up with executive coaching for the three key leaders that will be likely to lead any change that is defined.
	Inspiring employees	One of the primary functions of leadership is to provide inspiration to employees. The Human Resources Manager will provide training to the senior leadership team in areas of motivation and how to inspire employees towards excellent teamwork, among other topics. An inspired workforce is likely to be more productive and effective for Prime Funds and so this is considered to be a core goal of the management and leadership training that needs to be achieved. Success in this area will be measured by a motivation survey that will be completed at the start of the training, and six month after the training, to compare the differences, with attempts made to take into account other factors that might potentially have degraded motivation.
	Scanning the business environment	Prime Funds does have some experience with scanning the business environment, however tools will be implemented for doing this in a more robust and formal way, and more frequently. Training will be provided to the other members of the senior leadership team by one member of the leadership team who has the experience in this area. Success will be measured by reviewing the number of surprises that arise during the course of each quarter. The goal will be to reduce the number of surprises that the business environment seems to bring for the organization, by being better generally better informed.

Training and development that is provided will be benchmarked against what companies that are considered to be leaders in leadership development are doing. This will help to ensure that Prime Funds is delivering the most optimal training and development program that it possibly can to its employees.

In addition to the training detailed in the table above, each employee will be able to opt for up to two courses per year (or up to a week of time) that they believe will develop their skills further. The training strategy outlined above looks to fill gaps for the organization (deficit strategy) rather than also approaching training in a more proactive manner. Giving each employee the chance to learn something that they are interested in and that will inspire them is considered to also be necessary and additionally will be motivational for employees.

While the researcher took on board the information in the literature review and the important analysis that suggested that leaders and managers need to both have the skills of one other in order to be highly effective, while reviewing the job descriptions of the individuals to be trained, it could be seen that gaps existed in the more traditional areas associated with these roles in each case. That is, while leaders tended to be assessed fairly well for functions such as planning and budgeting, they were less good at “traditional” leadership skills such as defining strategy and vision for the organization, and scanning the business environment for any issues that might arise.

However, it is also worth noting that the training and development strategy provided is considered to be the starting point to correct problems in the organization, especially at the lower levels, where basic management skills are lacking. Once the junior managers master these skills, they will be invited to start also developing their leadership skills, taking similar courses to those to initially be taken by the leadership team. In addition, coaching will be provided by the senior management team to the junior leaders to help them to further develop their leadership skills.

Overall, it is considered that the leadership and management training plan that has been detailed above will serve to meet the needs of Prime Funds in terms of addressing gaps that exist in training. While the training has been segregated into forms of training suitable for leadership and those suitable for management skills, it is believed that for the current lifecycle stage of the organization, this is the most appropriate strategy for success.

# Conclusion



This research sought to understand the differences between leadership and management skills and abilities, and how training plans should be devised to make sure that an organization has sufficient levels of these skills to succeed.

At the outset of this research, several goals were set, and these are illustrated in the table below. The goals of this research were largely met, and more detail is provided relating to this in the table.

<b>Objective</b>	<b>Met or not?</b>
To understand the difference between skills of leadership and management and to determine why this is important in organizations.	A thorough review of the literature as it relates to both leadership and management has served to meet this critical objective.
To review how effective training and awareness programs might be in promoting an understanding of the	This objective has been met, and in particular it has been explained how certain training and development tools



differences between management and leadership within an organization.	such as 360 degree feedback can be used to promote an understanding of the need for training and development as well.
To create an implementation plan for improving both leadership and management skills in an organization.	This objective has been met and a management and leadership training and development plan has been presented. This plan focuses on the filling of specific gaps that were identified among the managers and leaders of the organization and seeks to achieve this while on a relatively low budget, through use wherever possible of skills and abilities that exist in-house.
To produce general recommendations for improvement of understanding of management and leadership responsibilities in a specific organization, Prime Funds.	During the literature review it became apparent that both management and leadership skills were needed by the organization and it was considered to not necessarily be particularly prudent of the Prime Funds leadership team to train these differences to other member of the team. Instead it seemed more appropriate to focus on the development needs of different individuals at different levels in the organization.
To understand and recognize similarities and differences, as well as strengths and weaknesses of both leadership and management. The outcome of this will be to be able to develop leaders and managers within Prime Funds, and facilitate the movement of this information filtering through the organization to all leadership and management levels.	This was partially met, in the sense that strengths and weaknesses of both leadership and management are now understood, and there is no bias towards either one or the other as being more important. Steps have been taken in the training and development plan to filter different levels of information throughout the organization.

A potentially interesting area for future research might be carrying out an investigation into what is considered to be good and bad management and what is

considered to be good and bad leadership and to ensure that the definitions for all four of these terms are clearly understood and agreed on. The challenge with not doing so is that as per the literature review, bad management is all too commonly compared to good leadership, which is an unhelpful comparison to make.

Of great importance, in the literature there tends to be significant focus on management skills being bad and leadership skills as being good, when both are clearly required for organizational success. While these skills are defined as being quite separate and distinct, and are, people are not clear cut and easy to analyze and put into a box of either “leader” or “manager”. A leader may be very good at planning and scheduling, but poor at determining a vision for the organization. A manager might be bad at budgeting, but have outstanding leadership communication skills. It is important therefore, not to fall into the trap of considering that leadership and management skills are as distinct and separate as the literature review seems to imply. Leaders can have management skills and vice versa. Each person is different, and as a result of this investigation, the researcher recommends analyzing training needs largely on a one by one basis.

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