

Pathways to Management and Leadership

Level 3: First Line Management

Unit 3004V1

Managing and Communicating Information

Pathways to Management and Leadership

Unit 3004V1: Managing and Communicating Information

Copyright © Chartered Management Institute, Management House, Cottingham Road, Corby, Northants, NN17 1TT.

First edition 2005

Author:	Ian Favell
Series consultant:	Merritt Associates
Consultants:	Philip Cullen Graham Hitchcock Reginald Snell
Project Manager:	Sid Verber
Editor:	Lyn Ward
Page layout by:	Decent Typesetting

Second edition 2008

Revision author:	Ian Favell
------------------	------------

Revised July 2013

British Library Cataloguing in Publication Data. A catalogue record for this title is available from the British Library.

ISBN: 0-85946-531-4

All rights reserved, save as set out below. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording or otherwise, without the written permission of the copyright holder except in accordance with the provisions of the Copyright, Designs and Patents Act 1988 or under the terms of a licence issued by the Copyright Licensing Agency Ltd, 90 Tottenham Court Road, London, England W1T 4LP.

Applications for the copyright holder's written permission to reproduce any part of this publication should be addressed to the publisher. Permissions may be sought directly from Chartered Management Institute in Corby, UK. Phone Publications on (+44) (0) 1536 207379, or e-mail publications@managers.org.uk for further information.

This publication is sold subject to the condition that it shall not, by way of trade or otherwise, be lent, re-sold, hired out, or otherwise circulated without the publisher's prior consent in any form of binding or cover other than that in which it is published and without a similar condition being imposed on the subsequent purchaser.

Approved centres may purchase a licence from the publisher, enabling PDF files of the publication to be printed or otherwise distributed solely within the centre for teacher and student use only according to the terms and conditions of the licence.

Further information on the licence is available from Chartered Management Institute. Phone (+44) (0) 1536 207379, or email publications@managers.org.uk.

Managing and Communicating Information

SAMPLE MATERIAL

SAMPLE MATERIAL

Contents

About this workbook	7
The unit	7
The aims of this workbook	7
Syllabus coverage.....	8
Getting started	8
How to use the workbooks	9
Section 1 Systems and methods	11
Information is everywhere	11
Types of information.....	12
How information travels.....	17
Information sharing in organisations	22
Summary	33
Section 2 Collecting, selecting and storing information	35
Collecting information.....	35
Active information management.....	39
Criteria for selecting information.....	44
Storing information	46
Confidentiality	49
Summary	51
Section 3 Using information	53
Data and information	53
Using information appropriately	54
Making numbers work for you	57
A picture is worth a thousand words	64
Summary	68
Section 4 Identifying trends and patterns.	69
Why trends and patterns can be useful.....	69
Summary	79

Before you move on	81
Preparing for assessment.....	81
Reflecting on progress	83
Planning next steps	83
The Management and Leadership Standards	84
 Bibliography	 85

SAMPLE MATERIAL

About this workbook

The unit

The main purpose of this workbook is to support you as you study for the Chartered Management Institute Level 3 – First Line Management, so it specifically focuses on the content of the syllabus for Unit 3004V1, *Managing and Communicating Information*.

This workbook provides underpinning knowledge and develops understanding to improve your skills as well as to prepare for future assessment. If you are studying towards the Level 3, then you will be assessed by your approved centre on 'your knowledge and understanding of' the following learning outcomes:

1. Be able to gather and select data
2. Be able to interpret data and information related to a work activity
3. Be able to communicate the results of the information analysis.

The content may also assist you with some aspects of Unit 3009V1, *Management Communication*.

The aims of this workbook

This workbook aims to help you learn how to:

- gather and select information
- validate and analyse information
- communicate information effectively.

Syllabus coverage

The table below shows which sections of the workbook address the assessment criteria of the qualification syllabus.

Unit 3004V1: Managing and Communicating Information Syllabus coverage	Addressed within section
1.1 Identify criteria used in sourcing data	2, 3
1.2 Identify quantitative and qualitative sources of data	1, 3
1.3 Access data in line with legal and organisational requirements relevant to a work related activity	2
2.1 Select data and information specifically related to the work activity	1, 3
2.2 Identify trends and patterns	2, 3, 4
2.3 Identify the impact of the trends and patterns on future activities	2, 4
2.4 Identify conclusions and make recommendations	4
3.1 Identify the communication methods that could be used	1
3.2 Identify the target audience for the communication	1
3.3 Evaluate the impact of the communication	2

Getting started

Information is the oil that keeps organisations running smoothly. Like oil, it comes in many forms and is packaged in many different ways. It flows freely within the machinery, but also flows freely outside of the correct channels if it escapes or is spilled. The right information in the right place, at the right time, used in the right way, can enhance and develop organisational and management success. The wrong information, or information wrongly used, can inhibit organisational initiatives and even core operations.

So it is vital that, as a manager, you are aware of what information needs you have, where and how you will obtain and store information, and how you will use it, both in your key tasks, and also for informing and advising others.

How to use the workbooks

The workbooks provide ideas from writers and thinkers in the management and leadership field. They offer opportunities for you to investigate and apply these ideas within your working environment and job-role.

Structure

Each workbook is divided into sections that together cover the knowledge and understanding required for that unit of the Level 3 in First Line Management. Each section starts with a clear set of objectives that identify the background knowledge to be covered, and the management skills in the workplace that enable you to demonstrate this knowledge. You do not have to complete the sections in the order they appear in the workbook, but you should try to cover them all to make sure that your work on the unit is complete. There are self-assessment questions at the end of each section that allow you to check your progress. You may want to discuss your answers to the self-assessment questions with your line manager or a colleague.

Activities

Throughout the workbooks there are activities for you to complete. These activities are designed to help you to develop yourself as a manager. Space is provided within the activities for you to enter your own thoughts or findings. Feedback is then provided to confirm your input or to offer more ideas for you to consider.

To get the best from the workbooks, you should try to complete each activity fully before moving on. However, if the answer is obvious to you because the issue is one you have encountered previously, then you might just note some bullet points that you can then compare quickly against the feedback. You may sometimes find it difficult to write your complete response to an activity in the space provided. Don't worry about this – just keep a separate notebook handy, which you can use and refer to as needed.

Try not to look at the feedback section before completing an activity. You might like to try covering up the feedback with a postcard or piece of paper while you are working through an activity.

Timings

Timings are suggested for each section and activity, although it is important that **you** decide how much time to spend on an activity. Some activities may occupy only a few moments' thought, while others may be of particular interest and so you might decide to spend half an hour or more exploring the issues. This is fine – the purpose of the activities is to help you reflect on what you are doing, and to help you identify ways of enhancing your effectiveness. It is always worth writing something though, even if it's brief – the act of writing will

reinforce your learning much more effectively than just referring to the feedback.

Scenarios

There are scenarios and examples throughout each workbook to illustrate key points in real workplace settings. The scenarios cover a wide range of employment sectors. As you work through, you might like to think of similar examples from your own experience.

Planning your work

The reading and reflection, scenarios and activities in each section of the workbooks are designed to take around two hours to complete (although some may take longer). This is a useful indicator of the minimum length of time that you should aim to set aside for a study session. Try to find a quiet place where you will not be interrupted and where you can keep your workbooks, notes and papers reasonably tidy. You may also like to think about the time of day when you work best – are you a 'morning person' who likes to get things done at the start of the day, or do you work better in the evening when there may be fewer disturbances?

Preparing for assessment

Further information on assessment is available in the Student Guide produced as part of the *Pathways to Management and Leadership* series. If you have any further questions about assessment procedures, it is important that you resolve these with your tutor or centre co-ordinator as soon as possible.

Further reading

Suggestions for further reading and links to management information are available via ManagementDirect through the Study Support section of the Institute's website at <http://mde.managers.org.uk/members>. Alternatively, email ask@managers.org.uk or telephone 01536 207400. You will also find titles for further reading in the Bibliography at the end of this workbook.

The CMI Management Library holds an extensive range of books and pamphlets for loan to members. A postal loan service is offered to members in the UK only. You will only pay your return postal charges. Go to www.managers.org.uk/library to review the collection and to place your requests.

Section 1 Systems and methods

Learning outcomes

(about 2½ hours)

By the end of this section you should be able to:

- 1.2 Identify quantitative and qualitative sources of data
- 2.1 Select data and information specifically related to the work activity
- 3.1 Identify the communication methods that could be used
- 3.2 Identify the target audience for the communication.

Information is everywhere

Information... informs. Start with that as a simple idea and the rest of the apparently complex world of information management falls into place. Information provides you with the raw materials you need to:

- make decisions
- monitor progress
- make proposals for improvements
- plan effectively
- keep your boss up to date
- keep your team up to date
- keep yourself up to date.

Like all raw materials, information comes from a range of suppliers, and you have to be just as careful about how you use this resource as you are about any other.

Increasingly, information is one of the keys to organisational success, and therefore one of the most important aspects of your work. You need to consider how to:

- select the type of information you need
- identify the sources of that information
- select the methods that you will use to obtain it
- store and retrieve it effectively
- use it for making decisions
- decide who needs to know
- select the communication method to best inform them
- report or present the information or outcomes to others.

One of the main developments in information is the increase in the amount that is available. Due to the internet and email, organisations and individuals are now flooded with it.

In the days before modern information technology, the problem was that managers were often starved of essential information. Today, the problem is more likely to be information overload. The key is to get the right information, in the right format, at the right time, and to the right people.

Types of information

You may have come across the terms 'soft information' and 'hard information'.

Hard information

Hard information is factual, accurate and largely provable. Two, or more, external and independent observers would agree that it is factually correct. It often involves accurate numbers, taken from monitoring systems.

You will often see the expression 'quantitative' used to refer to items of information that express quantities – numbers. This is an example of information at the hard end of the spectrum.

Activity

Activity 1.1

(about 5 minutes)

List some of the hard information you use in your work.

Feedback

There are many examples you may have thought of here. Hard information is contained in a variety of outputs, including:

- *sales figures*
- *lists of the numbers of employees, their qualifications and other details*
- *breakdowns of money spent*
- *budget statements*
- *statistics showing the level of output for each machine*
- *catalogues and price lists of supplies and raw materials*
- *marketing information detailing your services, availability and prices*
- *staff absences*
- *annual leave figures*
- *details or confirmation of arrangements for events and activities*
- *records of courses attended*
- *timetables.*

Each of these is clear, measurable and a fairly accurate fact.

Hard information is relatively easy to spot. It appears in reports and is used to make decisions that help meet the organisation's objectives.

However, on its own, it doesn't always give you the full picture.

Scenario

The computer isn't always right

If you feed a range of hard facts into a computer it will 'compute' an answer based on the facts and the 'rules' built into the software that is being used.

One early example is based on a simulation using a computer model. It began with the supposition that if accidents in the home were analysed they would probably show that 76 per cent of all accidents occur on the top or the bottom step of the stairs.

When these facts were fed into the software model, the recommended answer came out as 'remove the top and bottom steps'. Perfectly logical, in a way, but not helpful in reducing the level of accidents taking place on the stairs – or making a staircase design any easier.

If a computer were able to exercise judgement it might have said 'tell me more', or asked some probing questions.

SAMPLE MATERIAL

Activity

Activity 1.2

(about 10 minutes)

Imagine you are told the following facts, and are expected to make a recommendation based on them. What would you say?

- We have 20 widget-making machines, but 4 are not being used.

- The widget-making section has a permanent staffing establishment of 35 and has 6 unfilled vacancies.

- By this time last year we had made 655 widgets. This year in the same period we have made 540 widgets.

Your recommendation is...

Feedback

You may have said: 'Fill the vacancies and let's get on with doing as well as we did last year'. The trouble is that making a judgement based on only these few hard facts may lead you down the wrong path.

You may have thought you needed more information before you could make your recommendation. Managers are there to use the hard facts and interpret their implications, and that often means asking for more. So, you may have said, 'tell me more'. Perhaps you felt there may be some other hard facts that haven't been thrown into the equation, such as:

- *orders for widgets are 20 per cent down on last year.*
- *the sale of dooberies has gone up 30 per cent.*
- *there's a board decision not to fill the vacancies.*

Facts like these throw a different light on the picture. Now it starts to look as if the widget-making side of the business is on the decline, while dooberies are the way forward. But you need some further information... and this may have to be 'soft' information.

Soft information

Soft information is often referred to as 'qualitative information', or 'qualitative data'. It is open to interpretation, as it expresses qualities about the matter which may be subject to how the user of the information feels about those qualities. Observers of the same soft information may not interpret it in the same way.

Having access to the soft information about something will give you a wider picture of it.

Activity

Activity 1.3

(about 10 minutes)

What sort of soft information might you need to help you to make a recommendation about the widget-making side of the business?

Feedback

The sort of soft information you may want could include:

- *what do our customers feel about what is happening in the market – are widgets going to become popular again or is the trend towards dooberies going to stick?*
- *how good are our widgets compared to our main competitor's if we are fighting for a share in a smaller market?*
- *what do your customers think of the brand?*

None of these pieces of information are hard facts. They begin as judgements and 'gut feelings' that can add to the picture. They may be disputed by those with different opinions.

SAMPLE

Activity

Activity 1.4

(about 10 minutes)

What sorts of soft information do you use in your job? List as many examples as you can.

Feedback

You probably use a huge variety of soft information, and it won't be possible to list it all here.

Take a selection interview as an example. The hard information includes:

- *the candidate's qualifications and experience*
- *where they live*
- *whether or not they can drive.*

The soft information includes:

- *their approach to difficult people*
- *their reaction to stress*
- *the extent to which they will fit into the team.*

You may get indications about soft information like this from the application form or CV, but you will get a clearer picture from how the candidate responds in interview, particularly from their:

- *accounts of what they did in a particular situation*
- *answers to questions*
- *body language as they respond to you.*

When the interview panel is deciding on the best candidate for the job, interpretation of the soft information can generate debate. Soft issues will be the deciding factors in who is successful.

Scenario

'Tell me something I didn't know!'

An administrative officer in a County Council had come to the job from a sales background, where she had been successful, but not fulfilled. However, she wasn't happy in the local government environment either, and decided to go for career counselling to find out what job roles might suit her.

The firm she went to relied heavily on technology, rather than people, and administered a questionnaire that was marked by computer. The system then produced a range of possible career paths that would suit her.

The computer marked assessment came out with two very strong suggestions: sales and local government administration. She was not impressed!

It was only when she was able to discuss her feelings with the consultant that she could explain that it was not the job content, but the context that was unsettling her. The important, soft information was that she was unhappy because she didn't like the boss, and resented the many petty rules in the specific section she worked in.

The careers counsellor probed the officer's general feelings to find out exactly what it was that she didn't like, why, and what would make a positive difference. In this way, the soft information was converted into critical factors that could be used to make constructive suggestions. As a result, the officer decided not to change her career, but to move to an organisation where the culture suited her.

It is not only possible to turn soft information into something a little 'harder', it often pays to do so. If you are involved in making decisions and judgements based on a range of information, the more objective you can make it, the better chance you have of getting it right.

How information travels

You need the right information, in the right form, at the right time. That's clear enough – but how does it arrive with you?

There are two main areas to look at here.

- The systems used for passing information around organisations – essentially, the structures set up by the organisation and its people to circulate and disseminate information.
- The methods used to communicate information – both spoken and written.

For example, an organisation may have a system based on a management hierarchy – where the 'chain of command' up and down is the system for circulating information. The methods used within this system might vary according to the situation and the manager. It could involve a wide range of methods, from formal written memos, to informal face-to-face conversation.

Information systems in organisations

Start by having a look at the systems. There are many options. Here are five examples of the most common ones.

- Management hierarchy, where information is carried up and down through a clear chain of command and seniority.
- Representatives, where someone acting for a group of colleagues works on inter-departmental steering groups, union/management negotiating bodies and staff representative committees.
- Formal briefings, such as team briefings, where a consistent message is cascaded down and throughout the organisation.

- Networking, where people with similar interests, work roles and backgrounds make links. Sometimes this is facilitated by the organisation through secondments, job swaps and the careful construction of groups on training courses and so on.
- Databases and intranets, where information is held ready for when individuals or groups decide to call it up.

Activity

Activity 1.5

(about 20 minutes)

Alongside each of the five systems, make notes about their strengths and weaknesses. Then, add other systems that exist in your organisation, with their strengths and weaknesses.

System	Strengths	Weaknesses
Management hierarchy		
Representatives		
Formal briefings		
Networking		
Databases and intranets		
Others in your organisation		

SAMM