



**INVESTORS  
IN PEOPLE** | Scotland

# **HANDOUTS**

## **KNOWLEDGE NETWORKS**

**PERFORMANCE IMPROVEMENT**  
**Through effective planning and  
implementation**

April 2010 Knowledge Network Sets

**IMPROVING BUSINESS PERFORMANCE**

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## Handout 1

### Examples of Core Ideology

#### **Sony – Product leadership**

To experience, the sheer joy that comes from the advancement, application, and innovation of technology that benefits the general public:

- Being a pioneer – not following others, but doing the impossible
- Respecting and encouraging each individual's ability and creativity

#### **Wal-Mart – Customer focus**

We exist to provide value to our customers – to make their lives better via lower prices and greater selection; all else is secondary:

- Swim upstream, buck conventional wisdom
- Be in partnership with employees
- Work with passion, commitment and enthusiasm
- Run lean
- Pursue ever-higher goals

#### **3M - Innovation**

Our real business is solving problems

- Innovation – that shall not kill a new product idea
- Absolute integrity
- Respect for individual initiative and personal growth
- Tolerance for honest mistakes
- Product quality and reliability

#### **Johnson & Johnson – Customer focus**

The company exists to alleviate pain and disease.

- We have a hierarchy of responsibility
  - Customers first
  - Employees second
  - Society at large third
  - Shareholders fourth
- Individual opportunity and reward based on merit
- Decentralization = Creativity = Productivity

#### **Marriot – People focus**

Friendly service and excellent value (customers are guests): make people away from home feel they are among friends and really wanted:

- People are our number 1. Treat them well, expect a lot and the rest will follow
- Work hard, yet keep it fun
- Continual self improvement
- Overcome adversity to build character

## **HANDOUT 2**

### **SYNDICATE - NIFTY HOMES Ltd**

#### **Core Ideology = Purpose and Core Values**

The story so far:

Great Aunt Matilda left you £1,000,000 to start or buy a business. As a team you have already looked at people management issue and learning and development issues and the outcomes of this are on the Investors in People Web Site

It is three months since Great Aunt Matilda left you the £1,000,000. You have carried out your market research and you have identified that you want to buy an established building company. Nifty Homes Ltd has been trading for 30 years. There has been no succession planning in the business and the sole owner now wants to sell the business. You have struck an excellent deal for the company.

Nifty Homes employs the following 40 staff:

- Two contract managers
- Four supervisors who are all going to retire in the next 6 years
- Twenty tradesmen all in their fifties
- Two planners and estimators
- One buyer
- Five office staff
- Six sales people all part time

Nifty Homes builds basic box houses and they are competing against volume builders. In this economic situation they are struggling to compete. You have spoken with some of their employees. They are all good experienced people but their morale and confidence is at low ebb. The previous management style was top down and very aggressive.

The business strategy you have agreed with your fellow directors is to:

- Move from volume house builders to specialist builders, building homes to meet the needs of individual customers from land purchase to fitting out.
- You want to work in close partnership with key organisations across the design, build and handover stages of the process. Initial organisations selected are:
  - Archie the architect
  - Isobel Duncan the interior designer
  - Bob the builder to give you extra build capacity

The key people issues are:

- You want to involve the workforce in the changes that will need to be made to the business
- A start point of this is to agree a new purpose statement for the business aligned to your strategy.
- Also you need to agree core values that will be essential for the business to meet the way it now wishes to operate.

**As a syndicate come up with an initial draft purpose for the business and up to 6 key values which will support this purpose**

## HANDOUT 3 – CASE STUDIES

### Different ways to plan and implement strategy

#### Case study 1 – Analytical approach

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good practice » Strategy » Examples of Strategy in Practice » Theory » Good Practice Examples » A Spoonful of Sugar - The Rapid Rise of the Pharmaceutical Company, Prostrakan.



### The Rapid Rise of the Pharmaceutical Company, Prostrakan

**The Scottish pharmaceutical business ProStrakan may have its headquarters in the small Borders town of Galashiels, but its vision is far more global. The organisation has grown rapidly since its conception in 1995, and now has its sights set firmly on the vast US market. In this article we look at the strategies the company has used to achieve its successes.**

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Strakan merged with Proskelia to form ProStrakan in 2004.

Flotation on the London Stock Exchange in 2005 raised £40 million.

First half-earnings in 2007 up 28%.

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#### Visions and goals

ProStrakan's goals, according to its website, are to:

- build a significant international pharmaceutical company based on a self-sustaining business model
- alleviate the often distressing symptoms associated with hitherto poorly treated medical conditions[1]

At its most simple, this means bringing novel and effective prescription medicines to the market, either from the organisation's existing research and development portfolio or by licensing other organisations' products.

When ProStrakan first started out, it identified a gap in the market for low risk, minimum investment products. One of the advantages of pitching at this level is the cost associated with the research and development of new drugs.

It costs around £100 million to research and develop a new drug. This increases to £400 million for drugs that actually reach the market.

For every prescription drug that is cleared for use, another 10,000 will have been through a robust screening process and failed to reach the market.

Given these figures, ProStrakan opted to concentrate on a comparatively small number of products which, although not ground-breaking, were relatively quick and inexpensive to get to market.

CEO Dr Wilson Totten states: 'We'd rather bring five products with a guaranteed medium return into circulation successfully than take a chance on ten potential high performers

which may or may not provide substantial returns.'

## **Financial goals**

One of ProStrakan's most important medium term goals is to achieve profitability. Dr Totten states that, whilst the aims and goals on the website certainly drive the underlying strategy of the organisation, he would describe them as 'Sunday Best' goals. Ultimately, since ProStrakan floated on the stock market, shareholder expectations play a large part in the organisation's strategic aim, and shareholders demand profitability.

ProStrakan's early strategy is certainly paying off. In the four years between 2000 and 2004 sales grew by 4160% and in 2005 the company was awarded a Scotland Technology Fast 50 award.[2] 2005 also saw a successful initial public offering (IPO) of shares when ProStrakan was listed on the London Stock Exchange, raising £40 million.

The current strategic goal is to increase the annual turnover by 525% from £80 million to £500 million by 2013. So how does this fit in with the organisation's low cost attitude to research and development?

### **1. Minimum investment, maximum return**

The answer is to think about the drug from the patient's perspective. ProStrakan has used this strategy to great effect in the production of Sancuso™, which is used to treat nausea and vomiting in chemotherapy patients.

The drug was already in wide use in both tablet and injection form. The research and development team at ProStrakan realised that the last thing a nauseous patient felt like doing was swallowing a tablet, or travelling to a surgery for an injection. Instead, they adapted the drug for use as a patch that can be worn on the skin. As Dr Totten says, 'It's obvious really, and yet no one had thought about it.'

Whilst this innovation isn't headline grabbing, it is an example of how ProStrakan has added a valuable and profitable product to its portfolio without breaking the bank or spending years on research and development. Equally as important, the product will make the lives of many chemotherapy patients more bearable, and underpins ProStrakan's twin aims of sustainability and the alleviation of distressing symptoms.

### **2. Growth through mergers and acquisitions**

Becoming a significant international pharmaceutical company takes time to achieve by organic growth alone. Over the last few years, therefore, ProStrakan has grown both its product range and sales team through an aggressive strategy of mergers and acquisitions (M&A).

In 2005 alone, ProStrakan acquired four organisations: two in Spain, one in France, and another in Germany. The main driver behind these strategic purchases was to increase its sales presence in Europe. The acquisition of these four companies has also facilitated the licensing of new drugs in Europe.

### **3. Employee engagement**

Dr Totten believes that ProStrakan benefits from being a relatively small, albeit rapidly growing, organisation. His philosophy is that a small workforce can be subject to fewer constraints, and that given this freedom employees rise to the challenge and flourish. Without restrictions there are opportunities for ProStrakan employees at all levels to make a difference.

## **Success factors**

Given that between 50% and 70% of mergers and acquisitions fail to earn back the cost of the capital invested by the acquiring firm, why does ProStrakan think it has had so many successful acquisitions?[3] Dr Totten believes that, whilst thorough research and a careful choice of company are key, using common sense and trusting your gut instincts can be just as important. ProStrakan has walked away from three possible M&As this year because the potential added value didn't merit the risks or possible complications.

Dr Totten feels it is essential that, after a merger or acquisition, any necessary restructuring is done as quickly as possible to minimise the ongoing impact to the

organisation and keep the forward momentum going. He says that once you're committed to the process, concentrate, focus and keep everything moving. As soon as things start to drift then the problems begin, including the onset of low morale and a loss of productivity.

ProStrakan has never shied away from making difficult decisions, and in December 2006 sold off its Paris research and development unit. The deal, which allows ProStrakan to continue to benefit from selected commercialisation rights for products already in demand, substantially reduces its outgoings and is another step towards achieving profitability.

### **What comes next?**

ProStrakan remains ever conscious of the need to balance the acquisition of ready made infrastructures with the acquisition and development of new products. It is with this in mind that the organisation's strategy has recently taken a shift away from the multiple acquisitions of the last few years towards a period of more organic growth where the profits made from the products already on the market can be ploughed back into research and development of new ones.

ProStrakan aims to expand its position in Europe, as well as maintaining a presence in the UK, but its main focus over the medium term is the US. The organisation plans to have a US sales force in place by the second half of 2008, and Dr Totten does not rule out further acquisitions in order to facilitate this.

He is wary, however, of having only one growth strategy, especially one as risky and unpredictable as M&As. To this end, ProStrakan has set into action the grounding for Plan B, starting by obtaining a £50 million secured debt facility. If the right acquisition opportunity is not forthcoming in the US, then the debt facility is available to recruit and train a sales force of its own.

Although the interest payable on the debt facility is by no means inconsiderable, ProStrakan has opted for this tax-efficient method of funding its expansion into the US as opposed to issuing further shares, which would dilute the worth of the current shares.

### **Conclusion**

ProStrakan is a home-grown company with a global appetite, and its careful strategic moves during its early years are clearly paying dividends. Careful analysis of the market and its competitors has helped ProStrakan identify a niche in the market, and prudent M&As have provided the products and people needed to exploit the anticipated opportunities in the US.

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## Case study 2 – Emergent approach focusing on workforce innovation

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Examples » W.L.Gore: Letting Ideas Breathe



### W.L.Gore: Letting Ideas Breathe

**W.L. Gore is consistently placed near the top of Fortune magazine's annual list of the 100 Best Companies to work for, and has won the Sunday Times 'Top 100 Best Companies to work for' for the last four years running. Clearly the employees enjoy working for the organisation, and this is certainly a factor in the competitive advantage enjoyed by the company. However, the major contributor behind both employee job satisfaction and the ongoing success of the organisation, is without doubt the innovative management system implemented by its founder, Bill Gore, in 1958.**

**Bill Gore had been working for DuPont for many years when he developed a new idea based on an insulated wire. After failing to convince his employer of the benefits of manufacturing the product, he decided to set up on his own. Initially the business was family-run and based in his home, but as orders increased a commercial plant became necessary. The organisation grew rapidly, and 12 years later W.L. Gore was operating worldwide and even had wire and cables on the moon. W.L. Gore are probably best known for GORE-TEX®, a membrane which, when applied to clothing, creates a 100% waterproof, breathable fabric, ideal for all outdoor activities. However, its product range is much broader and includes guitar strings, medical solutions and aviation protective clothing.**

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#### About W.L. Gore

1958 - W.L. Gore and Associates Inc. founded by Bill and Genevieve Gore in their basement in Newark, Delaware.

1976 – Patent awarded for GORE-TEX®

1997 - Gore introduces ELIXIR®, and reinvigorates the market for coated guitar strings.

2003 - GORE SEAMGUARD® Bioabsorbable Staple Line Reinforcement Material is launched for lung and gastric bypass procedures.

2008 - W.L. Gore celebrates 50 years of pioneering management innovation.

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### Car park vision

The drive to create an alternative, innovative way of managing the organisation came from an observation Gore made about communication and honesty between workers in large, hierarchical organisations. Gore realised that the only really honest discussions took place in the car park, when employees felt they could talk freely without worrying about anyone overhearing. Based on this observation, he decided that the best way to structure his organisation was to avoid as far as possible the use of a hierarchical top-down traditional structure. He therefore implemented a 'lattice' structure, where

there are no traditional organisational charts, chains of command, ranks or job titles. Instead of job titles, all employees are known as Associates. The Associates are encouraged to communicate directly with each other and are accountable to fellow members of multi-disciplined teams. Hands-on innovation is encouraged by involving those closest to a project to make the decisions about how the product will evolve and be brought to market. Teams organise around opportunities and leaders emerge naturally, usually by consensus, and leaders are therefore defined by the presence of voluntary followers.

Communication is not through predetermined channels, but springs from a culture determined to encourage free and creative thinking, where people collaborate and communicate through self-motivation rather than a sense of duty.

When forming the organisation, Bill Gore also decided that instead of a mission or vision statement and a code of values he would determine four basic operating principles:

- fairness to each other and everyone with whom we come into contact
- freedom to encourage, help and allow other Associates to grow in knowledge, skill and scope of responsibility
- the ability to make one's own commitments and keep them
- ability to make decisions without reference to others, but in consultation with other Associates before taking actions that could seriously negatively impact the success of the company

## **Get big, stay small**

By 1965, W.L. Gore was growing and thriving, employing about 200 Associates. One day, whilst on his customary tour of the plant, Gore realised that, for the first time, he did not personally know everyone who worked for him. Concerned that teams were getting too big and would be unable to sustain the lattice structure he had implemented, he decided to innovate further and split the plant, creating two smaller plants, with smaller integral autonomous teams.

From that day on Gore elected to employ an expansion strategy of 'get big by staying small'. There is now a policy in place that no plant has more than 200 Associates, and as a result the small plants demonstrate the close-knit impersonal atmosphere Gore imagined when he had his car park epiphany.

## **Does it work?**

Innovative ways of approaching management make for great reading and case studies, but do they actually work? For W.L. Gore the emphatic answer has to be yes, as the points below demonstrate.

- W.L. Gore continues to bring innovative products to the market, ranging from surgical products to guitar strings.
- Consistently ranked at or near the top of all recognised 'Best Places to Work' rankings.
  - years of steady earnings and growth without a single annual loss

The culture of innovation within the organisation is now completely embedded. If any Associate can convince a group of their peers that an idea has merit and they are willing to spend time helping with it, it becomes an official project, complete with allocated funding.

Gore attributes the ongoing success to a number of factors.

### **1. Open culture**

The innovative lattice structure first envisaged by Gore allows the multi-disciplined teams of Associates to identify technology and market opportunities.

### **2. Small teams**

Working as small task forces enables the Associates to act as if they are solving a crisis. There is no time for the formal rules that stifle progress, and by which many conventional organisations live.

### **3. Passion**

Associates are encouraged to spend some of their time, typically around 10%, developing speculative new ideas. W.L. Gore rewards this with a profit-sharing scheme, driving employees to continually search for innovative and lucrative products to take to market.

### **4. Taking the long view**

W.L. Gore is impatient with the status quo but patient with new ideas and product development, sometimes taking decades to bring revolutionary products to market. The organisation is still privately owned, allowing it to take time to fine tune products without the pressure of delivering quarterly financial reports.

### **Celebrating failure**

When a project doesn't work out and the team decides to call it a day, they celebrate with beer or champagne just as they would if it had been a success. Celebrating failure in this way encourages risk taking and prevents the emergence of a blame culture.

### **Conclusion**

The success of W.L. Gore is tantamount to the vision of its founder. His innovation in 1958 was seen by some as maverick, perhaps even foolhardy.

Fifty years on, whilst some accountants would have a field day questioning the cost effectiveness of cross functional teams in numerous buildings and locations, the ongoing success of W.L. Gore demonstrates that a vision, built on a fundamental understanding of how people work when allowed to self-direct, can result in many years of innovation and profitability. The organisation remains a marketplace for ideas which is visited by thousands of executives looking for inspiration. They might not leave with a clear vision of what to do next, but the very fact that they've visited is the first step to developing their own management innovation style.

## Case Study 3 – Adaptive approach based on great product and a highly capable and flexible team.

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### **Honda's Success in the US Market – Deliberate or trail and error strategy**

**In 1959, Honda entered the US motorcycle market and took the leather-clad, two-wheeled world by storm. However, two different accounts of how Honda achieved success have sparked fierce debate by academics over the driving force of Honda's strategy. Was it, like a Boston Consulting Group (BCG) report said, that wily executives crafted a deliberate strategy intent on penetrating the US market? Or, was it as Pascale suggests a stumble into success by a few key people who decided to just 'give it a go'?**

#### **The source of the debate**

It all began with a seemingly innocent report by the BCG in 1975 on the demise of Britain's status in the world motorcycle industry. The report was commissioned by the British Government with the aim of providing a declining industry with commercially viable alternatives. However, in the process, the report commented on how Honda had managed to steal such a share of the market Britain was struggling to cling on to. (From 1959 to 1973, Britain's share of the US motorcycle industry had dropped from 49% to 9%.)[1]

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#### **What the BCG report said**

The BCG outlines a very deliberate tactic by Honda to build on their success in the domestic market in order to enter world markets in the 1960s. In the 1950s, Honda held a high domestic market share with its 50cc motorcycle. High demands necessitated high-volume production processes, which gave Honda a step-up in world markets due to volume-based cost reductions.

Honda established an American subsidiary (when other producers were relying on distributors) and set out to sell to members of the public who never before considered owning a motorcycle. In order to do this, Honda is said to have initially pushed the market with small, lightweight motorcycles, which it sold for under \$250, compared with up to \$1,500 for the biggest American and British machines. To grab the target market, Honda deliberately attempted to dissociate its motorcycles with the negative image of bikers at the time. Their advertising campaign 'You Meet the Nicest People on a Honda' proved a great tactic for this move.

Prior to 1960, Harley-Davidson maintained the market lead, but by 1966 Honda slowly seized up to 63% of the market share. Honda is said to have achieved this by starting small on the West Coast and developing the market, region by region, over a period of four to five years. The strategy was to be a low price producer, and use aggressive advertising and pricing to expand their market. Honda's success was due to their highly automated techniques, superior technology, careful consideration of the market requirements and

shrewd marketing strategies.

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## **Pascale sparks the debate**

In his seminal 1984 article, Pascale nullified many of the assumptions made by the BCG. He did this by going straight to the source – the six executives responsible for Honda's entry into the US motorcycle market. By interviewing these key people, Pascale was able to uncover some of the reasons certain choices were made during Honda's voyage into the US motorcycle market.

Pascale's article describes the inventive genius of the somewhat unorthodox founder of Honda – Sochiro Honda. It was Sochiro Honda's breakthrough engine design that sparked market demand for Honda motorcycles and allowed the organisation to achieve a large slice of the industry share in Japan. Also contributing to this success, but very much a secondary factor, was Honda's methods of mass-production, designed in response to the high demand for the new style of engine.

Sochiro Honda had a great passion for racing his motorcycles, and it was from this passion that innovations in engine design transpired. In the 1950s, Fujisawa, Honda's partner, applied the innovations to what he saw as a great commercial opportunity – a small motorcycle that could be used by small commercial establishments for delivering goods. This is where the 50cc Supercub was introduced. It was an instant success, so much so that an overwhelming demand necessitated a new plant with a 30,000 unit per month capacity.

Confidence was high and profits were soaring. Encouraged by their success, Honda decided to look further a field for new ventures. So, in late 1958, two Honda executives were sent to explore the US market to assess the viability of selling there. The report back was less than positive. The executives felt that because there were very few motorcycle dealers in the country and as everyone already seemed to own a car, selling in the US would be no easy task.

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**“In truth, we had no strategy other than the idea of seeing if we could sell something in the United States.”**

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Even though the odds seemed against them, Fujisawa authorised the venture as it seemed feasible that Honda could at least achieve 10% of the European export market. In 1959 Honda chose to market the 50cc Supercub, 125cc, 250cc and 305cc machines, with a particular focus on the larger machines to match the existing demands of the US market. Los Angeles (LA) was chosen as the initial location for selling the bikes due to its large Japanese community and suitable climate for motorcycling. Starting small was not so much a strategic move, but more to do with the financial controls determined by the Japanese Government and the negative impressions the executives got from their initial visit to the US.

Once set up in LA (with one warehouse in a run-down section of the city), Honda tried to sell the larger bikes through any retailer that would respond to their adverts in trade magazines. However, a few months in, the larger bikes began to develop engine troubles. This forced Honda into selling the 50cc Supercubs. Surprisingly, it was sporting goods shops that took on these bikes, not motorcycle dealers as expected – and even more surprisingly, the 50cc Supercubs started to sell. However, even though the bikes were selling, Honda was still reluctant to push this market in fear of alienating those who would buy the bigger and more expensive (higher profit) motorcycles.

As for the fierce marketing strategy outlined in the BCG report, the 'Nicest People' campaign of 1963 was in fact designed by an undergraduate for a routine piece of coursework, which just happened to find its way to Honda's management team. Even this campaign was highly debated within Honda and only just squeezed its way through into mainstream advertising. The ensuing success as Honda's sales soared marked the beginning of its dominance in the US motorcycle industry.

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**'By 1964, nearly one out of every two motorcycles sold was a Honda'**

[4]

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## **Analysis**

Pascale's report of Honda's rise to dominance gives real insight into how unexpected circumstances, minor decisions and small steps can collectively precipitate major strategic change.

**Pascale maintains that Honda's success was driven by its propensity for adaptive change, the actions of individuals and groups and the actions of upper management to steer rather than direct change.**

Since Pascale's article, many authors have commented on the Honda case study and applied their own theories to the debate. Mintzberg certainly concurs with Pascale's analysis, as it fits nicely with his theory of emergent strategy (where strategies emerge that were not expressly planned or intended). He says that had rational planning been part of Honda's approach, the 'probable non-starter' of the small motorcycle would have never got off the ground. He suggests that learning through trial and error was crucial to Honda's strategy, as it informed the deliberate planning process.[5]

But where does this leave us in terms of how we should develop strategy? Goold, as co-author of the BCG report, wonders what use the emergent strategy view offers in terms of practical advice for implementing strategy. He even goes as far as to question whether managers should try endless 'non-starters' to see where they get.[6] Of course this is unfeasible, and has led many authors to agree that the integration of learning and deliberate planning enabled Honda's success.

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**'Too much stability breeds rigidity. Excessive instability yields disintegration. Only the right blend generates a new coherent pattern.'**[7]

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Prahalad and Hamel have more recently applied their thinking on core competence to the debate. They look at the wider issue of how Honda has been able to go from nowhere to prominence in not only the motorcycle industry, but also in the automobile and other industries. They suggest that Honda's competence in engine design and manufacturing processes facilitated its dominance in the US motorcycle industry. And, while the 50cc bikes were flying off the shelf, Honda was already building on its competences, e.g. by racing larger bikes, and thus building the skills and technology they would need for expansion across other industries, such as boat engines, generators and even snow blowers. In this way, Honda's strategic direction is in fact deliberate and managed – by constantly building core competencies in design and manufacturing and competing through innovation. [8]

## **Conclusion**

Goold raises the interesting point that any one academic theory applied to strategy is likely to only yield a partial truth.[9] So, perhaps no one theory can be applied to the Honda case study to take into account all of the nuances of instinct, strategy and good luck the organisation encountered. However, valuable lessons can still be learnt from the academic analysis. Crucial to Honda's success was:

- the cost advantage developed by effective processes and economies of scale
- its propensity for adaptation and change
- its ability to learn through experimentation and innovation
- development and leveraging of core competence

## **HANDOUT 4**

### **Implementation Exercise – Let's go to Greece**

#### **Concept**

As a syndicate you have just won £1500 pounds for each person from the Greek Tourist Board to take a holiday anywhere in Greece. By a remarkable coincidence you all have two weeks holiday booked starting from 15 June and you have no commitments.

Your spouse/partner/friend/pet has no objections to you taking a holiday as you have worked so hard this year and he/she/it knows you need a well deserved break.

The holiday is part of a competition. The Tourist Board would like you to create a promotional diary of your stay supported by photographs. The team who has the best diary will win another £1500 per person.

#### **Requirements**

1. You must have all plans and administration in place by 13 June.
2. All costs such as accommodation, food and drink to come out of the £1500 spending money.
3. You must not spend more than £1500 each that you have been given
4. How you spend your time in Greece is up to you.

#### **Task One – Vision/Concept/ Agenda**

First agree a common vision/concept/ agenda for the project:

1. Do you plan to stay in one place and carry out a detailed analysis?
2. Do you plan to stay in selected destinations such as islands, highlands and cities to get a range of experiences?
3. Do you plan to move every day to cover as much of Greece as possible?
4. Or do you have a separate vision/agenda for the project?

#### **Task Two - WBS**

1. Use work breakdown structure to define the tasks required from start of planning to hand over of the diary.

#### **Task Three – Scheduling**

1. Agree a simple schedule for the project with key tasks by dates and who is responsible

#### **Task Four – Risks and Assumptions**

1. Identify any assumptions for the project
2. Identify risks and how these can be eliminated or negated

#### **Task 5 – Learning**

1. Identify key learning from this and how this learning can be applied to your own implementation project

## HANDOUT 5 - THE INVESTORS IN PEOPLE FRAMEWORK- SUMMARY OF CONTENTS

PLAN				DO				REVIEW	
01: Business Strategy	02: Learning and Development Strategy	03: People management strategy	04: Leadership and management strategy	05: Management Effectiveness	06: Recognition and reward	07: Involvement & empowerment	08: Learning & development	09: Performance Measurement	10: Continuous improvement
<b>THE STANDARD</b> Top managers make sure that and people can confirm that:									
1.1 The organisation has a vision, purpose and strategy and plan	2.1 Learning priorities are clear and are linked to the plan	3.1 People are encouraged to contribute improvement ideas	4.1 Managers are clear about the capabilities managers need to lead, manage and develop their people	5.1 Managers are effective and can describe how they lead, manage and develop their staff	6.1 People believe they make a difference	7.1 Ownership and responsibility are encouraged	8.1 People's learning & development (L&D) needs are met	9.1 Investment in learning can be quantified	10.1 Evaluation results in improvements to people and strategies and management
1.2 People are involved in planning	2.2 Resources for learning and development are made available	3.2 There is equality of opportunity for development & support	4.2 People know what effective managers should be doing		6.2 People believe their contribution is valued	7.2 People are involved in decision making		9.2 Impact on performance can be demonstrated	
1.3 Representative groups are consulted	2.3 The impact will be evaluated								
<b>YOUR CHOICE</b> Top managers make sure that and people can confirm that:									
1.4 Clear core values relate to the vision and strategy	2.4 Learning and development strategy builds capability	3.3 The recruitment process is fair, efficient and effective	4.3 Leadership & Management capabilities for now and the future are defined	5.2 Managers are models of leadership, teamwork and knowledge sharing	6.3 Reward and recognition strategies link to business strategy and are externally benchmarked	7.3 Effective consultation and involvement is part of the culture	8.2 L & D resources are used effectively	9.3 The contribution of people strategies is measured and evaluated	10.2 Self review and information from external review are used
1.5 Key performance measures are used to improve performance	2.5 Plans take account of learning styles	3.4 A diverse, talented workforce is created	4.4 Managers are supported to acquire these capabilities	5.3 Coaching is part of the culture	6.4 Representative groups are consulted (where appropriate)	7.4 People are supported and trusted to make decisions	8.3 Learning is an everyday activity	9.4 Impact on key performance measure can be described	10.3 Effective feedback methods are used to understand people's views on how they are managed
1.6 Social responsibility is taken into account in the strategy	2.6 People make decisions about their own learning	3.5 A work life balance strategy needs the needs of the people and the organisation	4.5 Leadership & management strategy link to business strategy taking account of external good practice	5.4 People are helped to develop their careers	6.5 What motivates people is understood	7.5 Knowledge and information are shared	8.4 Innovative and flexible approaches to L&D are used	9.5 Performance improves as a result of people management and development activities	10.4 Internal and external benchmarking is used
1.7 People and stakeholders are involved in strategy development	2.7 Learning and development is innovative and flexible	3.6 Constructive feedback is valued	4.6 Every one is encouraged to develop leadership capabilities	5.5 There is a culture of openness and trust	6.6 Success is celebrated	7.6 People are committed to success	8.5 People are given the opportunity to achieve their full potential	9.6 Career prospects improve	10.5 People's views on how they are managed improves
	2.8 There is a culture of continuous learning	3.7 The structure makes the most of talents			6.7 Benefits strategy goes beyond legal requirements	7.7 There is a culture of continuous improvement	8.6 All learning is valued	9.7 Flexible approaches to measuring return on investment (ROI) are used	10.6 People believe the organisation is a great place to work
					6.8 Colleagues achievements are recognised	7.8 People can challenge the way things work	8.7 Mentoring is used	9.8 ROI in people is reported to stakeholders	
						7.9 There is a sense of ownership and pride in working for the organisation			

## HANDOUT 6

### Examples of Investors in People Planning Frameworks

#### Example 1 – The G1 Group

This is the actual assessment plan that the G1 Group used for their last Investors in People Assessment using the Framework approach. It is reproduced by the kind permission of Mr David McDowall, G1 Group Operations Director.

Business drivers	People issues	Linkage to IIP Framework
<p><b>“Its Show Business”</b></p> <p>The décor, the staff, the events all add up to the G1 experience at each venue. Each venue brand has to be developed and continually refreshed so that existing customers return regularly and new customers are continually taking part in the overall experience</p>	<p><b>Culture</b></p> <p>The culture within the values is developed across the 3 “Ss” of</p> <ul style="list-style-type: none"> <li>• Sales culture</li> <li>• Service</li> <li>• Standards</li> </ul> <p>It is a business where excellence is expected. The challenge is to do this each night whilst continually refreshing the brand.</p>	<p><b>Learning</b></p> <p>2.4 Learning and people development is structured to meet the needs of the business.                  2.6 People feel engaged in decisions about learning                  2.7 There is a culture of continuous learning at the venues and within the Group overall                  7.9 There is a sense of ownership and pride of being part of G1                  10.7 People believe that G1 is a great place to work</p> <p><b>Reward</b></p> <p>6.2 Reward and recognition strategies are aligned to business drivers and are coherent with incentives towards the 3 “Ss”                  6.5 Success is celebrated</p> <p><b>Review</b></p> <p>9.3 Contribution of peoples strategies for G1 is measured and evaluated against the venue and G1 business drivers</p>
<p><b>Commercial leadership</b></p> <p>G1 has achieved its rapid growth model by having highly competent managers within Group Operations and at the Venues who are empowered and can make good commercial decisions quickly for both the short and long benefits of G1</p>	<p><b>Capabilities</b></p> <p>It is a fast paced culture in a highly competitive market which is in recession. Leadership and management capabilities have to support this way of working. Managers have to be good people managers. They also have to have commercial acumen and drive.</p> <p>Intuition is an important part of how the business operates. It is a company which does carry out a great deal of research but experience and feel are also essential to support the rapid growth which has been achieved.</p> <p>It is an entrepreneurial culture. The challenge is to drive the business and to bring people with them.</p>	<p><b>Leadership strategy and effectiveness</b></p> <p>The leadership and management strategy, development and performance improvement links with the overall business strategy and takes account of the degree of autonomy required at each venue.</p> <p>Evidence Requirements</p> <p>1.7 Values at the heart of strategy                  3.7 Structures makes the most of talents                  All indicator 4 requirements                      Capabilities                      Development                      Review                      Linked with business strategy                      Every one is encouraged to develop leadership qualities for empowered working and high levels of service</p> <p>5.2 Top managers are role models for G1 and the business they are running                  5.5 Team work is focused across the 3 “Ss”</p> <p><b>Involvement</b></p> <p>1.2 People are involved in the business planning process (appropriate to their role).                  7.4 People feel that the support and trust is there to make the right decisions which affect the business.                  7.8 People can challenge the way things work.</p>

## Example 2 – Corporate Service Division of a Local Authority

