

CUSOURCE[®]
eLearning

Harvard ManageMentor[®]

Updated: April 2011



CUSOURCE Credit Union Knowledge Network
300 The East Mall, Suite 500 | Toronto, ON M9B 6B7
1.888.367.1386 | clientsolutions@cusource.ca | www.cusource.ca

Content Index

Budgeting	4
Business Case Development.....	4
Business Plan Development.....	4
Career Management.....	5
Change Management.....	5
Coaching	6
Crisis Management.....	6
Customer Focus	6
Decision Making	7
Delegating	7
Developing Employees.....	7
Difficult Interactions	8
Dismissing an Employee	8
Diversity	9
Feedback Essentials	9
Finance Essentials	9
Goal Setting	10
Hiring.....	10
Innovation and Creativity	10
Innovation Implementation.....	11
Laying Off Employees	11
Leading and Motivating	11
Managing Upward	12
Marketing Essentials	12
Meeting Management.....	12
Negotiating	13
New Manager Transitions.....	13
Performance Appraisal	14
Performance Measurement	14
Persuading Others.....	15
Presentation Skills	15
Process Improvement.....	16
Project Management	16
Retaining Employees.....	17

Strategic Thinking.....	17
Strategy Execution	18
Stress Management	18
Team Leadership	19
Team Management	19
Time Management.....	20
Virtual Teams	20
Writing Skills.....	20

Introduction

Harvard ManageMentor (HMM) is an online resource that “mentors managers” with tips, tools and advice on 42 different topics including Business Case Development, Coaching, Developing Employees, Innovation and Implementation, Process Improvement and Team Leadership. A fundamental design element of HMM is to enhance the day-to-day performance of managers; therefore, HMM offers immediate application and transferability to the job through a variety of proven concepts and tools, worksheets, step-by-step guides and rich media content. This rich media content includes interactive learning activities such as scenarios, self-paced instruction, self-tests, and skills practice. HMM helps new managers and branch managers develop core management skills; for experienced managers at all levels, it is an excellent “refresh” tool with links in each module to Harvard Business School articles for the most current thinking on each topic.

Duration:

- Each module will take approximately 2-3 hours to complete.

Pre-requisite:

- Individuals must complete the registration for the user license for Harvard ManageMentor before registering for any of the courses.

Price:

- \$189 per person for 12 months (for access to all 42 modules and downloadable tools).

Benefits:

- Provides a variety of materials for leadership professionals with varying levels of experience, skill and knowledge.
- Each module is structured and organized into 6 different sections: Getting Started, Learn, Practice, Apply, Explore Further and Additional Features.
- Offers a variety of interactive learning activities including media-based scenarios, self-paced instruction and self-tests and skills practice.
- Includes downloadable audio files provide greater flexibility and convenience
- Print function adds to portability of material.

Registration and Completion:

- Complete the user license for Harvard ManageMentor registration.
- Register for 1 or more of the modules.
- Complete 75% or more of any module (including the quiz) and receive “completed” status on the LMS.

More Information:

- For more information, visit our website at www.cusource.ca or call 1-888-367-1386 to speak with a CUSOURCE® staff member directly.

Modules

Budgeting

CU08-HMM-BUD

Learn about the budget process, different types of budgets, and common budgeting problems- so you can allocate resources wisely to meet your goals.

- Understand what budgets are and how the budgeting process works
- Prepare different types of budgets
- Create "what if" scenarios
- Monitor and evaluate budget performance

Business Case Development

CU08-HMM-BCD

Learn how to create an effective business case, from defining the opportunity and analyzing alternatives to presenting your final recommendations.

- Clearly define the opportunity you'll want to address in your business case
- Identify and analyze a range of alternatives
- Recommend one option and assess its risks
- Create a high-level implementation plan for your proposed alternative
- Communicate your case to key stakeholders

Business Plan Development

CU08-HMM-BPD

Takes you step by step through the process of preparing an effective plan for a business proposal. The steps you will learn are applicable to launching a new internal product as well as seeking funding for a new start-up business.

- Learn the kinds of information that need to be contained in a successful business plan
- Present that information so that your readers get what they need and understand quickly what you're asking of them

Career Management

CU08-HMM-CAM

Learn how to manage your career--including how to identify your business interests, professional values, and skills in order to target your most exciting career possibilities.

- Identify your core business interests, work reward values, and skills
- Identify the career opportunities within your current role or organization that will let you express those interests, achieve those rewards, and use or develop those skills
- Benefit from career-development resources and processes like career counselors, mentors, networking, informational interviewing, and professional development reviews
- Help others manage their careers

Change Management

CU08-HMM-CHM

Learn how to manage change constructively and navigate the ups and downs that inevitably accompany a change effort.

- Recognize the different types of change programs observed in organizations
- Prepare your unit or group to become change-ready
- Understand a systematic approach for creating and implementing change
- Recognize the importance of communicating throughout all phases of a change effort
- Understand and address people's reactions to change
- Take care of yourself during a change program

Coaching

CU08-HMM-COA

Learn how to strengthen your coaching skills by using a four-step process to facilitate the professional growth of the employees you coach.

- Recognize that coaching is an ongoing, two-way process that takes place as the need or opportunity arises
- Implement a four-step process to prepare for and lead effective coaching sessions
- Conduct coaching sessions using a variety of coaching techniques
- Provide ongoing support and follow-through for the person being coached
- Strengthen your coaching skills

Crisis Management

CU08-HMM-CM

Learn a practical, hands-on method for looking at crises--from developing a crises audit to avoid and prepare for crises, to managing an actual crisis, to learning from past events.

- Avoid a crisis through planning
- Prepare to manage crises you can't avoid
- Recognize a crisis and contain it before it spreads even further
- Resolve a crisis in the most effective way
- Learn from past crises
- Take care of yourself during a crisis

Customer Focus

CU08-HMM-CF

Learn how to target the right customers and build their long-term loyalty by developing systems for learning about--and responding to--their needs.

- Understand the service profit chain—and in particular the interrelationships among customer satisfaction, customer loyalty, employee capability, and company profitability
- Build and refine a process for delivering extraordinary value to these key customers

Decision Making

CU08-HMM-DM

Learn how to identify underlying issues related to a decision, generate and evaluate multiple alternatives, and then communicate and implement your decision.

- Create a context for making successful and ethical business decisions
- Identify common obstacles that stand in the way of effective decision making
- Assess the underlying issues related to the decision
- Generate and evaluate multiple alternatives
- Make a final decision
- Communicate and implement the decision

Delegating

CU08-HMM-DEL

Learn how to choose what to delegate, match employee and delegated assignment, and set the stage for success by both developing your employees and freeing up your time for critical managerial tasks.

- Use different approaches to delegating
- Use different methods to select the right person for the job
- Support, monitor, and track the assignment

Developing Employees

CU08-HMM-DE

Learn how to encourage your employees to learn and grow, while maximizing the return on the management time you invest in employee development.

- Understand why employee development is critical to business success
- Recognize your role in developing employees
- Evaluate your employees' individual developmental needs
- Motivate top employees, grow solid contributors, and act decisively on underperformers
- Conduct successful career development discussions

Difficult Interactions

CU08-HMM-DI

Learn how to discuss and resolve difficult interactions in the workplace--whether with employees, peers, bosses, or even suppliers and customers.

- Decide which types of situations are worth investing time and energy to resolve
- Overcome barriers to action
- Identify the interpersonal differences that trigger difficult interactions
- Productively discuss the emotions that difficult interactions can raise
- Design solutions that satisfy your and the other party's most important interests and concerns
- Coach your direct reports to help them learn to resolve difficult interactions

Dismissing an Employee

CU08-HMM-DIE

Learn how to effectively manage a dismissal--including making key decisions before, during, and after the critical event--and then how to set your team on a positive new path.

- Make key decisions before, during, and after a dismissal
- Communicate effectively with employees about a dismissal
- Decide whether to dismiss a problem employee
- Conduct a dismissal correctly

Diversity

CU08-HMM-DIV

Learn how to manage diversity to extract maximum value from your employees' differences -- including how to recruit diverse talent, resolve diversity-related conflicts, and communicate with employees and customers from other cultures.

- Understand the unique value and challenges that come with a diverse workforce
- Manage diversity-related conflicts in your team
- Foster an inclusive work environment
- Leverage the advantages that diversity offers
- Recruit and retain diverse talent
- Communicate effectively with employees, partners, and customers from other cultures

Feedback Essentials

CU08-HMM-FE

Learn when and how to give effective positive or corrective feedback, how to offer feedback upward, and how to receive feedback.

- Give effective, appropriate feedback
- Receive feedback and act on it
- Identify strategies for resolving feedback breakdowns
- Respond to critical feedback

Finance Essentials

CU08-HMM-FIE

Learn the essential concepts of finance--budgeting, forecasting, and planning. For managers who are not financial managers.

- Understand what the three basic financial statements and ratio analysis tell about a company's financial health
- Develop and track a budget
- Assess an investment opportunity

Goal Setting

CU08-HMM-GS

Learn how to set realistic goals, prioritize tasks, and track milestones to improve performance and morale.

- Use your work priorities to set effective goals
- Plan for obstacles in achieving goals
- Monitor implementation of your goals
- Evaluate your process for achieving goals

Hiring

CU08-HMM-HIR

Learn how to identify the particular skill set needed for a job, and then how to research and interview leading candidates until you find the one who best fills your need.

- Recruit a diverse pool of qualified candidates
- Screen résumés and prepare for an effective hiring interview
- Conduct a successful interview, focusing on how to open, maintain, and close the interview
- Follow up with an appropriate offer

Innovation and Creativity

CU08-HMM-IC

Learn how to manage an intellectually diverse work group and their environment to produce more--and better--ideas that encourage innovation when developing products and work processes.

- Recognize your own cognitive preferences as well as those of your team
- Assess how creativity is supported in your work environment
- Design teams to increase their creative potential and channel conflict towards productive purposes
- Alter attitudes, group norms, and physical surroundings in ways that improve the likelihood of innovative results

Innovation Implementation

CU08-HMM-II

Learn how to implement an innovation--from crafting a vision statement to gaining support and managing resistance--and turn an idea into reality.

- Draft a vision statement for your innovative idea
- Identify key stakeholders and cultivate an informal support network
- Build a business case for your innovation
- Effectively communicate your idea to get necessary approvals and resources
- Manage resistance and keep people enthusiastic about your idea

Laying Off Employees

CU08-HMM-LOE

Learn how to effectively manage a layoff--including making key decisions before, during, and after the critical event--and then how to set your team and company on a positive new path.

- Make key decisions before, during, and after a layoff
- Communicate effectively with employees about a layoff
- Rebuild a dedicated, high-performing post-layoff team

Leading and Motivating

CU08-HMM-LM

A synopsis of the essential tasks of leadership: setting direction, aligning people, and motivating others. Learn how to recognize the skills and characteristics of effective leaders, create an inspiring vision, and energize people to support and work toward your goals.

- Distinguish between managing and leading
- Recognize the skills and characteristics of leaders
- Understand that leaders use different styles
- Create an inspiring vision and align people to achieve it
- Understand what motivates people, and how to foster an inspiring work environment
- Learn techniques for energizing problem employees

Managing Upward

CU08-HMM-MU

How well do you work with your supervisor? Gain insight into developing a mutually rewarding relationship, with skills for communicating and negotiating with your manager. Includes tips on presenting problems or opportunities to your supervisor and accepting responsibility for your proposed actions.

- Develop strategies for understanding your manager's goals and preferred working style
- Build a better working relationship with your manager through effective communication and negotiation techniques

Marketing Essentials

CU08-HMM-ME

Written especially for non-marketing managers, this module includes fundamentals that will help people throughout the organization better understand the importance of marketing and how it relates to them.

- Grasp the basic elements of a marketing strategy and plan
- Create a marketing orientation in your group or firm
- Understand and navigate the steps in the marketing process
- Plan effective marketing programs, advertising campaigns, and sales promotions

Meeting Management

CU08-HMM-MM

A timesaving guide to planning and conducting meetings from start to finish. Covers preparation, keeping the meeting on track, and follow-up. Includes expert advice for dealing with problem behaviors exhibited by meeting participants.

- When to call a meeting and what kind of decision-making process to use
- How to plan and prepare for a productive meeting
- How to conduct a successful meeting and follow up after it
- How to manage problem behaviors and intervene at key points during a meeting.

Negotiating

CU08-HMM-NEG

A practical guide to becoming an effective negotiator. Includes steps to guide you through the negotiation process: assessing your interests as well as those of the other party, developing opportunities that create value, avoiding common barriers to agreement, and implementing strategies to make the negotiation process run smoothly.

- Understand the basic types of negotiation and the key concepts underlying them
- Prepare for, conduct, and close a negotiation
- Maintain a good negotiating relationship with the other side and maximize value for both sides
- Avoid common errors and overcome common barriers to agreement

New Manager Transitions

CU08-HMM-NMT

Learn what it means to be a manager, as well as how to navigate the complex and often stressful transition from individual contributor to a new manager.

- Learn what to expect during your transition from individual contributor to new manager
- Understand the crucial differences between being an individual contributor and leading a team or department
- Manage the dynamics behind power and influence
- Learn how to adjust your managerial style to meet your team's or department's performance needs
- Build effective, well-functioning teams
- Cope with the stresses and emotions of becoming a manager

Performance Appraisal

CU08-HMM-PA

Learn how to prepare for, conduct, and follow up on performance evaluations--in ways that link employee performance to your company's and group's goals.

- Use informal performance assessments and feedback as part of your regular interactions with your employees
- Prepare for a formal performance meeting with a direct report
- Document a performance meeting
- Create a development plan with the employee

Performance Measurement

CU08-HMM-PM

A review of financial and non-financial measures used in all areas of organizational performance. Addresses both standalone measures (including ROI, EVA, and BET) and measurement frameworks such as dashboards, quality models, and the Balanced Scorecard. Includes a systematic process for tracking performance of initiatives that can generate improvements across the organization.

- Understand the importance of regularly measuring your group's performance
- Gain familiarity with formal performance measurement systems
- Apply a disciplined process to performance measurement
- Avoid common performance measurement pitfalls
- See how measuring your group's performance can help you better manage that performance

Persuading Others

CU08-HMM-PO

Master the art and science behind successful persuasion -- and begin changing others' attitudes, beliefs, or behavior to create win-win solutions. Formal authority no longer gets managers as far as it used to. To do their job -- accomplishing work through others -- managers must develop and use persuasion skills rather than simply issue orders.

- Understand what persuasion is
- Build your credibility
- Gauge your audience's receptivity to your ideas as well as their decision-making style
- Appeal to listeners' sense of logic and connect emotionally with them
- Overcome resistance to your ideas
- Activate persuasion "triggers," or mental shortcuts your audience may take to decide whether to support your ideas
- Prompt your listeners to persuade themselves to back your proposals

Presentation Skills

CU08-HMM-PS

Sound advice on preparing and delivering presentations that command attention, persuade, and inspire. Includes rehearsal techniques as well as tips for creating and using more effective visuals. Also addresses the importance of understanding your objectives and your audience to create a presentation with impact.

- Prepare an effective presentation customized for your audience and setting
- Deliver an effective presentation that produces action
- Address questions and keep people focused during your presentation

Process Improvement

CU08-HMM-PI

In this topic, you'll learn what business processes are; why improving them is essential; and how to carry out a business process improvement (BPI) initiative.

- Understand the importance and benefits of business process improvement (BPI)
- Plan a BPI initiative
- Analyze and redesign a current process that needs improvement
- Obtain the resources needed to change a process
- Implement a redesigned process
- Continually improve your business processes

Project Management

CU08-HMM-PRM

Learn the nuts and bolts of project management, including project planning, budgeting, team-building, execution, and risk analysis. Covers useful tools and techniques such as GANTT and PERT charts, Work Breakdown Structure, and variance analysis.

- Scope out a project and define project objectives
- Develop realistic schedules and set deadlines
- Create an accurate and usable budget
- Monitor budgets and keep projects on track
- Communicate progress and problems to stakeholders
- Assess risk and develop contingency plans

Retaining Employees

CU08-HMM-RE

Why do employees stay with -- or leave -- their jobs? Learn strategies for attracting and keeping top performers, how to handle common obstacles to retention such as burnout and work/life imbalance, and how to develop programs that address the diverse needs and interests of your workforce.

- Stay competitive in the war for talent by using creative and effective retention strategies
- Manage or remove common obstacles to retention, such as burnout and work-life imbalance
- Develop programs to better meet employees' diverse needs and interests
- Hire the right employees in order to improve retention

Strategic Thinking

CU08-HMM-ST

Practical advice for managers in charge of shaping and executing organizational strategy. Includes tips for analyzing opportunities, challenges, and the potential consequences of high-level action plans. Addresses identification of broad patterns and trends, creative thinking, analysis of complex information, and prioritization of actions.

- Understand what strategic thinking is and why it's valuable
- Recognize the personal traits, behaviors and attitudes, and cognitive capacities that strategic thinkers demonstrate
- View strategic thinking as a process
- Apply seven strategic thinking skills—seeing the big picture; clarifying strategic objectives; identifying relationships, patterns, and trends; thinking creatively; analyzing information; prioritizing your actions; and making trade-offs

Strategy Execution

CU08-HMM-SE

Learn what strategy is, how senior management and units work together to develop strategy, and how units support a company's strategy by developing and executing action plans for strategic initiatives. In many companies, senior management and units are involved in the strategic planning process. Why? This ensures that a company's strategies -- both corporate and unit -- are tightly aligned and that successful implementation can follow.

- Understand what strategy is, the elements of a strategic plan, and the strategic planning process
- Develop action plans for strategic initiatives that support your company's strategy
- Execute your action plans
- Ensure that your action plans remain focused and aligned with the corporate strategy
- Evaluate and reward excellence

Stress Management

CU08-HMM-SM

Learn the difference between positive stress that enhances productivity and negative stress that breeds tension, lowers productivity, and undercuts job satisfaction. Includes strategies for dealing with underlying causes of worry and stress, with tactical advice and coping mechanisms for immediate problem management.

- Understand the problem of excessive stress and worry in the workplace
- Identify ways to manage your own stress
- Develop strategies for turning worry into action
- Let your body help you deal with stress
- Practice good stress habits
- Help others deal with excess stress and toxic worry

Team Leadership

CU08-HMM-TL

Learn how to establish a team with the right mix of skills and personalities and create a culture that promotes collaborative work. Covers steps to leading an effective team and includes innovative, easy-to-implement self-evaluation tools.

- Evaluate whether you should establish a team
- Form a productive team
- Launch a team effort effectively
- Lead your team skillfully
- Assess your team's performance

Team Management

CU08-HMM-TM

Focus is essential to effective teamwork. Learn how to diagnose and overcome common problems - such as poor communication and interpersonal conflict - that can impede team progress, learn to take corrective measures to remove team problems and improve team performance.

- Diagnose common problems that can impede team progress
- Take corrective measures to remove team problems and improve performance
- Resolve team conflicts
- Promote interdependence within teams
- Improve your team leadership skills

Time Management

CU08-HMM-TIM

This module will help you master effective time management techniques. Learn how to analyze how you currently spend your time and pinpoint opportunities for improvement, set goals, prioritize tasks, plan your time efficiently using scheduling tools, control time-wasters, and evaluate your schedule once it is underway.

- Analyze your current time management and pinpoint opportunities for improvement
- Identify which tasks are most critical to achieving your long term goals
- Plan your time efficiently using scheduling tools
- Control time wasters
- Put your schedule into action, evaluate it along the way, and modify it as needed

Virtual Teams

CU08-HMM-VT

Concrete suggestions for forming virtual teams, including assessing their technology and communication needs, structuring the team to build trust, and keeping the team on track.

- Understand the benefits and challenges of virtual teams
- Create a strong foundation so that success is ensured
- Build a virtual community that promotes collaboration and ongoing communication
- Coach a team that you can't see
- Utilize technology to keep a virtual team organized, motivated, and productive

Writing Skills

CU08-HMM-WS

Skillful writing helps you accomplish your business objectives and extends your influence as a manager. Learn to create clearer, more effective written communications. Includes specific guidelines for preparing memos, letters, emails, and other common business documents.

- Organize your document according to your readers' needs
- Employ a variety of strategies for jump-starting your writing assignments
- Apply editing and design principles to heighten the impact of your message