Management Roles
Planning, Organising, Leading, Controlling
For Teachers

Introduction

Success in business does not just happen – it is not a matter of luck and success is certainly not guaranteed. The role of managers is imperative for a business to be successful.

For a business to successfully achieve its objectives managers need to pay careful attention to performing each of the key management roles of planning, organising, leading and controlling. This program provides a brief overview the five management functional areas of large-scale organisations, and then examines the four key management roles – planning, organising, leading and controlling – that are carried out in each of these areas.

Timeline

00:00:00 Management roles: Overview
00:03:22 Management roles: Planning
00:08:35 Management roles: Organising
00:11:55 Management roles: Leading
00:15:15 Management roles: Controlling
00:19:26 Credits
00:20:17 End program

Related Titles

Critical Issues in Business Success and Failure
Employment Relations and Conflict Resolution
Playing Your Part 1 – Diversity in the Workplace
Playing Your Part 2 – Workplace Relationships
Starting an Online Business – Small Business Management Series

Recommended Resources

- [www.businessballs.com/](http://www.businessballs.com/)
- [www.bhpbilliton.com](http://www.bhpbilliton.com)
Management Roles
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Student Worksheet
Initiate Prior Learning

1. Describe the activities undertaken in each of the following management functional areas.
   
   a) Finance

  _________________________________________________________________________________
   ____________________________________________________________________________
   ____________________________________________________________________________

   b) Human Resources

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   ____________________________________________________________________________
   ____________________________________________________________________________

   c) Operations

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   ____________________________________________________________________________
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   d) Marketing

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   e) Research and Development

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   ____________________________________________________________________________
   ____________________________________________________________________________
2. Allocate the following tasks to the appropriate key management role by writing the tasks in the following table.

<table>
<thead>
<tr>
<th>Task</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>motivating staff</td>
<td>Planning</td>
</tr>
<tr>
<td>measuring financial performance</td>
<td>Organising</td>
</tr>
<tr>
<td>ordering materials</td>
<td>Leading</td>
</tr>
<tr>
<td>allocating staff to tasks</td>
<td>Organising</td>
</tr>
<tr>
<td>devising strategies</td>
<td>Leading</td>
</tr>
<tr>
<td>modelling expected behaviour</td>
<td>Organising</td>
</tr>
<tr>
<td>comparing output against targets</td>
<td>Leading</td>
</tr>
<tr>
<td>monitoring production levels</td>
<td>Organising</td>
</tr>
<tr>
<td>formulating vision statement</td>
<td>Leading</td>
</tr>
<tr>
<td>inspiring workers to meet targets</td>
<td>Organising</td>
</tr>
<tr>
<td>establishing objectives</td>
<td>Leading</td>
</tr>
<tr>
<td>allocating resources for tasks</td>
<td>Organising</td>
</tr>
</tbody>
</table>
Active Viewing Guide

Management roles: Overview

1. What does the acronym POLC stand for?

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_________________________________________________________________________________

2. List the five key management functional areas.

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_________________________________________________________________________________
_________________________________________________________________________________
_________________________________________________________________________________
_________________________________________________________________________________

3. The marketing function focuses on the four ‘P’s? What are the four ‘P’s?

_________________________________________________________________________________

4. Human resources now views people as ‘assets’ rather than ‘instruments for getting work done’. Explain what you understand by this statement.

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_________________________________________________________________________________
_________________________________________________________________________________
_________________________________________________________________________________
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Management roles: Planning

5. a) Identify the three levels of planning.

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_________________________________________________________________________________
_________________________________________________________________________________
b) What is the time-frame for each level of planning?

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_________________________________________________________________________________

6. List the five steps of the planning process.

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_________________________________________________________________________________

_________________________________________________________________________________

_________________________________________________________________________________

7. Explain what is meant by a SWOT analysis.

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_________________________________________________________________________________

8. Explain why strengths and weakness tend to come from the internal environment whereas opportunities and threats tend to come from the external environment.

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Management roles: Organising

9. Define the key management role of ‘organising’.

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_________________________________________________________________________________
10. Why is it important for a manager to know what resources are available first, before they decide how to allocate these resources?

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_________________________________________________________________________________

Management roles: Leading

11. What are the tools a transactional leader uses to motivate employees?

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_________________________________________________________________________________

_________________________________________________________________________________

_________________________________________________________________________________

12. Contrast the style of a ‘transactional’ leader with a ‘transformational’ leader.

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_________________________________________________________________________________

_________________________________________________________________________________

13. There is an old saying that refers to the ‘carrot-and-stick’ approach to management. Discuss what type of leader would use this approach.

_________________________________________________________________________________

_________________________________________________________________________________

_________________________________________________________________________________
Management Roles
Planning, Organising, Leading, Controlling

14. Circle the ‘interpersonal’ qualities in the following list.

inspiring  threatening  focused  humility

vision  trusting relationships  humorous

15. Circle the ‘informational’ qualities in the following list.

ability to lead  ability to gather information

ability to understand information  ability to read

ability to communicate information  ability to summarise information

Management role - Controlling

16. What is the ‘control process’?

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_________________________________________________________________________________

17. Explain how the ‘control process’ assists the management role of controlling.

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_________________________________________________________________________________
**Extension Activities**

1. Conduct a class debate: ‘That planning is the most important management role to an organisation’s success’.

2. Complete the following table by identifying two tasks for each management role – planning, organising, leading, controlling – for operations management and human resources management.

<table>
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<tr>
<th>Role</th>
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<th>Human Resources Management</th>
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<tbody>
<tr>
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<td></td>
</tr>
<tr>
<td>Leading</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Controlling</td>
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</tbody>
</table>
**Management Roles**
Planning, Organising, Leading, Controlling

**Suggested Student Responses**

**Initiate Prior Learning**

1. Describe the activities undertaken in each of the following management functional areas.

   a) Finance
   Answers will vary but may include measuring profit, loans, interest rates, creditors, debtors.

   b) Human Resources
   Answers will vary but may include the management of people, recruitment, induction, staff appraisal, retrenchment, redundancy.

   c) Operations
   Answers will vary but may include the day-to-day activities of an organisation in terms of transforming inputs into outputs, good or services.

   d) Marketing
   Answers will vary but may include promotion of the organisation and its products, the 4 ‘P’s (product, price, place and promotion).

   e) Research and Development
   Answers will vary but may include innovation and invention

2. Allocate the following tasks to the appropriate key management role by writing the tasks in the following table.

<table>
<thead>
<tr>
<th></th>
<th>motivating staff</th>
<th>comparing output against targets</th>
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<td>measuring financial performance</td>
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Management Roles
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Active Viewing Guide

Management roles: Overview

1. What does the acronym POLC stand for?
   Planning, Organising, Leading, Controlling.

2. List the five key management functional areas.
   Operations, Marketing, Finance, Human Resources, and Research and Development.

3. The marketing function focuses on the four ‘P’s? What are the four ‘P’s?
   Product, price, promotion, place.

4. Human resources now views people as ‘assets’ rather than ‘instruments for getting work done’.
   Explain what you understand by this statement.
   Answers will vary but may include human resource managers working to achieve employee enrichment, fulfilment and motivation.

Management roles: Planning

5. a) Identify the three levels of planning.
   Short, medium, long term.

   b) What is the time-frame for each level of planning?
   Short-term planning – daily to six months; medium-term planning – 1 to 2 years; long-term planning 3 to 5 years.

6. List the five steps of the planning process.
   Setting objectives, analysing the environment, developing alternatives, implementing the plan, reviewing results.

7. Explain what is meant by a SWOT analysis.
   Answers will vary but need to mention that it is an assessment of the current strengths and weaknesses of an organisation, and the opportunities and threats that exist or may happen in the future.

8. Explain why strengths and weakness tend to come from the internal environment whereas opportunities and threats tend to come from the external environment.
   Answers will vary but may refer to organisations having more control over their internal environment and less control over their external environment.

Management roles: Organising

9. Define the key management role of ‘organising’.
   Organising is the process of arranging resources and tasks to achieve objectives.

10. Why is it important for a manager to know what resources are available first, before they decide how to allocate these resources?
    Managers need to know what resources they have before allocating them so that they put the right people, the right resources in the right place to achieve their objectives.
Management roles: Leading

11. What are the tools a transactional leader uses to motivate employees?
   Rewards, recognition, promotion, pay rises.

12. Contrast the style of a ‘transactional’ leader with a ‘transformational’ leader.
   Answers will vary but may refer to a transformational leader bringing people together and using vision to inspire motivation as opposed to using the tangible rewards of a transactional leader.

13. There is an old saying that refers to the ‘carrot-and-stick’ approach to management. Discuss what type of leader would use this approach.
   Answers will vary, but needs to refer to the transactional leader using rewards, or removing rewards to motivate employees.

14. Circle the ‘interpersonal’ qualities in the following list.

   inspiring  threatening  focused  humility
   vision  trusting relationships  humorous

15. Circle the ‘informational’ qualities in the following list.

   ability to lead  ability to gather information
   ability to understand information  ability to read
   ability to communicate information  ability to summarise information

Management role - Controlling

16. What is the ‘control process’?

17. Explain how the ‘control process’ assists the management role of controlling.
   Answers will vary but may include reference to the manager needing to compare the intended objectives to the actual results.
### Extension Activities

1. Conduct a class debate: ‘That planning is the most important management role to an organisation’s success’.
   **Answers will vary.**

2. Complete the following table by identifying two tasks for each management role – planning, organising, leading, controlling – for operations management and human resources management. **Answers will vary but may include:**

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<thead>
<tr>
<th>Role</th>
<th>Operations Management</th>
<th>Human Resources Management</th>
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<tbody>
<tr>
<td>Planning</td>
<td>• Development of production plans such as the Master Production Schedule (MPS)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Introduce a new system of quality control</td>
<td>• Plan the implementation of performance management systems</td>
</tr>
<tr>
<td></td>
<td>• Introduce a new system of quality control</td>
<td>• Plan the future human resources needs relative to strategic business objectives</td>
</tr>
<tr>
<td>Organising</td>
<td>• Developing staff rosters and allocating staff to specific tasks</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Organising a material management strategy such as Just in Time delivery (JIT)</td>
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<tr>
<td></td>
<td>• Coordinating human resources such as staff to conduct selection interviews</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Allocating financial resources to fund retrenchment packages</td>
<td></td>
</tr>
<tr>
<td>Leading</td>
<td>• Investigating and implementing new technologies</td>
<td>• Developing a new corporate culture</td>
</tr>
<tr>
<td></td>
<td>• Inspiring employees to adopt the new technology purchased to increase productivity</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Establishing a system to monitor employees’ sick leave and long-service leave</td>
<td></td>
</tr>
<tr>
<td>Controlling</td>
<td>• Establishing a monitoring system for stock control</td>
<td>• Monitoring the matching of employee performance reviews with training and development</td>
</tr>
<tr>
<td></td>
<td>• Comparing the level of waste to previous years</td>
<td></td>
</tr>
</tbody>
</table>