



*I'm not a pastry cook, but I've had to learn a certain amount about it. I'm not a baker, though I've had to learn how to do it. I'm a generalist cook. - Julia Child*



## TRAINING IN GENERAL MANAGEMENT

### Specializing in generalists

#### Level 1

1. Structure
2. Marketing and sales
3. Operations
4. Information
5. Human resources
6. Finance

A general manager, whatever their title, connects people from every management function in plans and projects. Most have P&L responsibility. Many executives are **generalists and specialists**, but confusion about roles is costly. Clarity lets everyone know how to interact.

### Focus on pragmatics

Generalists must have sufficient **practical management knowledge** of all six management functions. They are **systems thinkers**, chronically curious about how things connect.

We give general managers the practical tools and knowledge to help everyone work cross-functionally. See **The General Manager's Toolkit** and **The General Manager's Index of Terms** at [www.theindex.net](http://www.theindex.net).

### Benefits from great generalists: A critical succession

Senior managers must prepare the next generation for key positions of responsibility. **How can an organization capitalize on specialized skills** unless managers know how everyone connects? Creating a culture of **meaningful collaboration** has big benefits:

- Clear communications
- Fewer silos
- Strong morale
- Increased innovation
- Easier mergers
- **Clear path of promotion to the executive level**

*“The Center’s Management Self-Assessment provided extraordinary results. After the short training, our management team spotted both our gaps and strengths and then agreed quickly on the priorities.”*

Visit [www.theindex.net](http://www.theindex.net) or call 608-260-9300



## TRAINING DESIGN

### Learning objectives: Lifelong students of management

1. How to coordinate the work of people from every department
2. How to tackle a critical set of general management decisions
3. Where to find the best resources quickly

*The GM's Index of Terms is not just a library,  
it's a framework for lifelong learning.*

### Training team: Knowledge transfer

Each trainee **communicates closely with an internal mentor**, who asks provocative questions and identifies internal resources. This is efficient **knowledge transfer**.

Trainees are in small **cohorts** to enrich their experience, problem-solve and build departmental connections. **Coaching** is available for mid-career managers.

Of course, each trainee has a CMTP **trainer** to facilitate, answer questions and provide structure, resources and encouragement.

### Preparation: First learn the standard language

- Study The GM's Toolkit and The GM's Index of Terms
- Review trainee's 1-page goals statement with supervisor, mentor and trainer
- Identify "live" internal issues: e.g., a capital decision or product launch
- Take a basic course on financial statements

### Schedule and expectations: Fast-paced, project-based

- Each step takes two weeks, **5 months total**
- Each step includes a 2-hour session with homework
- Cohorts meet regularly to share ideas
- Trainees keep a journal and present their big ideas

### Self-funding

- Trainee projects can save more than program costs.
- Substantially less expensive than an MBA

*The Question Map and The GM's Index got my team asking questions at a very high level. We now use the Question Map to make major capital decisions. – Bryon Johnson, CEO, MCD, Inc.*



## TRAINING STEPS

Each step uses a tool to link a key practice and a key executive principle.

Level 1	Level 2	Level 3
1. Structure	1. Quality	1. Workflow analysis
2. Marketing and sales	2. Work process	2. Work process types
3. Operations	3. Production technology	3. Job design
4. Information	4. Supply chain	4. Production scheduling
5. Human resources	5. Logistics	5. Order fulfillment
6. Finance	6. Inventory	

- 1. Make a capital decision (case): Don't miss anything**
  - *Tools (Planning): Question Map (case)*
  - Debate definitions in *The GM's Index of Terms*
  - Homework: Catalog what you don't know
- 2. Analyze cost/benefit (case): Deliver ROI, not wishful thinking**
  - *Tool (Analysis): Cost/Benefit Summary*
  - Learn about precision vs. truth
- 3. Make a capital decision (live): Reality is messy**
  - *Tools: Question Map and Cost/Benefit Summary*
  - Map and analyze a live issue in your organization
- 4. Craft a vision: Think like an entrepreneur**
  - *Tool (Planning): 5-Year Look (case)*
  - Pair off and then compare
  - Homework: Create a 5-Year Look for your organization
- 5. Analyze organizational effectiveness: Face the facts**
  - *Tools (Analysis): Management Self-Assessment*
  - Of your organization or department or a local business
- 6. Create a strategic planning: Connect the dots**
  - *Tool (Planning): Goal Tree*
  - Create a Goal Tree for Antique Coffee
  - Abstract a goal tree for your organization
- 7. Plan a live project: Manage up, down and sideways**
  - *Tool (Execution): 1-Page Project Planner*
  - Improve inquiry skills: leading with questions
- 8. Allocate money: Get more from less**
  - *Tool (Analysis): Zero-Based Budget Worksheet*
  - Think of 3 projects to improve speed, cost and quality in your department
- 9. Remove barriers to action: Use time to maximum efficiency**
  - *Tool (Execution): Projects summary*
  - Summarize, then optimize all the projects you want to work on
- 10. Accountability, effectiveness and placement**
  - Write a 1-page reflection and program critique with three public promises
  - Check in as a group after 4, 8 and 12 months



## TRAINING OPTIONS

The training steps on the previous page can be modified to each situation. Other ways to alter and enrich our training follow:

### Introduction: General manager “bootcamp”

We kick off our half-day “bootcamp” by working through our “Antique Coffee” case to make a **capital decision**. We then use our Five-Year Look to craft a **vision**. We close by a structured discussion of the **personal qualities** needed to bring a vision to life. Participants learn practical tools, get introduced to the common body of knowledge—The GM’s Index—and can **assess** with their supervisors whether general management is right for them.

### Option: Interpersonal skills

We can collaborate with local firms to integrate training in interpersonal skills, including team development and working with different or difficult personalities. One alternative is **Full Sail Academy**, which uses sailing as a compelling experience and metaphor about how functions depend on each other to survive, to compete and to adapt to changing external conditions.

### Option: 3C leadership

While many people are both, managers and leaders require very different traits. **Managers help people work together; leaders inspire others to take a risk.** We believe leadership cannot be taught, but it can be developed. We believe leadership is primary about **courage, compassion and curiosity.** While we cannot teach these things, we can help our clients spot opportunities to challenge and develop themselves.

### Option: Communications

When Napoleon was asked to promote a lieutenant, he said, *Show me something he’s written!* While we have coached dozens of executives in critical presentations, we believe that **excellent communication stems from excellent writing.** Our *Better Business Writing* workbook helps people express their critical ideas clearly and succinctly.

### Option: New product capstone

An excellent way to integrate general management skills is to develop a new product proposal. Launching a new product or services forces certificate candidates not only to understand the full array of management disciplines, but how to put them in their **critical sequence**—and how to present a high-risk venture to the CEO or board of directors.