

## General Management Bootcamp

If you want to stay on the management track, you must be able to make the ten basic types of management decisions. CEOs need pragmatic managers that can step in and run a cross-functional project or group without missing a beat.

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

A manager helps people work together, and generalists work cross-functionally with all management disciplines. They often have P&L responsibilities, are part of a succession plan, or run big projects.

*Generalists are invaluable: organizations can't meet big goals without everyone working as a unit.*

### Program summary

In six half-day sessions over four months, in a cohort of five or six, you'll learn and apply management's standard tools, terms and practices to real issues (details on pages 3 to 5). Small group work naturally improves leadership and interpersonal skills. Learning continues after these sessions in The Center's Best Practices Workgroups. We provide career-long support.



The cohort will also reflect on the social and ethical issues of management today. The world needs people who see management as a calling. *And who doesn't want to be the boss everyone wants to work for?*

*The principles of management are the same in every sector: learning from peers in other industries is a great opportunity to grow.*

### About Lubar ([uwm.edu/business](http://uwm.edu/business))

The Lubar School of Business is one of America's top 100 business schools and has over 32,000 alumni. Its Strategic Leadership Series and other programs are for leadership and supervisory training.

### About The Center ([theindex.net](http://theindex.net))

The Center is a community of competent and caring managers dedicated to fostering meaningful work in a respectful environment. It the standards body for general management.

*"The Center's training got my management team asking questions at a high level and helped them collaborate across departmental lines. It introduced them to The GMs Index as a powerful, yet easy to use utility. As CEO, I could spot talent for big-picture thinking." – Bryon Johnson, CEO, MCD, Inc.*

## **Cost and time commitments**

Tuition is \$4,500 through July 2022, then increases to \$6,000 (15% of the average MBA).  
Tuition includes a year's membership in the Center.

*Diligence:* In a small cohort, training value depends on everyone contributing. Final award of the certificate will be decided by the instructor and the candidate's employer.

*Educational credits:* This certificate does not provide degree credit. It might, however, be accepted as continuing education credits in one's professional association.

## **Benefits to the organization**

- *Profits:* Management ability matters. Good managers improve the big KPIs
- *Employee engagement:* Strong generalists give everyone meaningful work
- *Single resource:* Lubar and The Center support each stage of a management career
- *Communication:* Using standard terms and tools breaks down communication barriers
- *Avoid reinvention:* Knowing best practices reduces reinvention and increases innovation

*Applying any of the tools on the next pages can save more than the tuition.  
Listen to proofs at the Lubar podcasts on News page at [www.theindex.net](http://www.theindex.net).*

## **TO LEARN MORE**

Call to learn more about the certificate and to discuss your particular needs. We are happy to answer any question about content, time requirements, coordination with your employer, etc.

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## PROGRAM DESIGN

### Learning objectives (benefits to the learners)

- Learn the tools for the ten core general management skills (pages 4 and 5)
- Master the standard language of management (The GMs Index at [www.theindex.net](http://www.theindex.net))
- Learn to ask CEO-level questions to solve cross-functional problems
- Learn where to find the best resources for any general management decision
- Understand the personal and moral characteristics of a great manager

### Cohorts and scheduling

You'll work in a cohort of five or six. Candidates have a say in who is in their cohort, and they participate in the scheduling. Many managers feel working with peers *outside* their organization and industry provided a richer learning experience.

### Preparation and evaluation

- Run our Self-Assessment (see the Milwaukee Model at Training at [www.theindex.net](http://www.theindex.net))
- Meet your cohort peers informally during orientation
- Study the Code of Managerial Power
- Work with your supervisor and instructor throughout the program
- Keep a confidential journal of personal reflections
- Re-run the Self-Assessment after the program

### Life-long learning in an active peer network

Tuition includes a year's membership in the Center for Management Terms & Practices, the standards body of general management. Participants start immediately in the Center's Best Practices Workgroups to expand and share their knowledge and executive experience.

*Being in a community of dedicated generalists fosters life-long learning*

### Session structure

We complete two topics (pages 4-5) in each of the six half-day sessions; sessions are two to three weeks apart. The cohort sessions are in person, the check-ins are virtual. Locations will rotate among the cohort's offices.

- Report on previous session's work and lessons
- Get a short presentation on using the two tools and their underlying principles
- Get started on each tool by applying them to a cohort member's current issue
- Generalize the ideas through facilitated discussion
- Work on the live issues between sessions

## Curriculum: The 10 Core Management Decisions

Management is a never-ending game of 3D chess. Good generalists must know how a decision about one thing affects everything else. It's critical, therefore, to understand the principles behind each tool and how they interconnect. Generalists keep asking three questions:

- ANALYSIS:** Why is this important?  
**PLANNING:** What *exactly* are we trying to achieve?  
**IMPLEMENTATION:** How can we do this most efficiently?

Each session covers two tools; *The GMs Toolkit* ([www.theindex.net](http://www.theindex.net)) has samples.

### ANALYSIS

#### 1a Decision-making (Question Map)

- **Lesson:** The value of every department's perspective and of asking great questions
- **Project:** Build, then check departmental questions set for recent decision

#### 1b Team development (Management Self-Audit)

- **Lesson:** Importance of systematically assessing personal and team strengths and gaps
- **Project:** Audit the cohort, a unit or an organization

#### 2a Risk assessment (Risk Assessment tool and Trends Outline)

- **Lesson:** A leader must take informed and brave risks to navigate the future
- **Project:** Agree on the top 3 risks affecting your organization in 2-5 years

#### 2b Process optimization (Workflow Scratch Sheet)

- **Lesson:** Analyzing processes in detail helps improve speed, cost *and* quality
- **Project:** Develop 2 workflow diagrams

#### 3a Cost/Benefit analysis (Cost/Benefit Summary)

- **Lesson:** How quantitative analysis and managerial judgement relate
- **Project:** Build or rebuild the analysis of a recent capital decision
- **Reflection:** How do different personalities interact with each other and with you?

The Center for Management  
Terms & Practices

Have The GM's Index of Terms ([www.theindex.net](http://www.theindex.net)) open for questions, context and resources:

- Get agreement on definitions
- Start with a scratch sheet
- Draft to compile, meaningful questions

**TOP 3 GOALS**

1. Increase direct margin
2. Reduce plant turnover
3. Earn sales from new job

**Initial decision question** (Should we add robotics to our assembly line?)  
**Final decision question** (Should we buy or lease the subassembly robot?)  
**Decision** (Lease the subassembly robot and evaluate it)

**1.0 STRUCTURE**

1. When do our sales when our key patent expires in 5 years?
2. Can we reduce warehouse space substantially?
3. How will we increase our new product pipeline?

**2.0 MARKETING & SALES**

1. How solid is our new product market research?
2. Is speed our only customer service challenge?
3. How might sales territories need to evolve?

**3.0 OPERATIONS**

1. Where will our bottlenecks move?

Question Map

INCREMENTAL COSTS			
Initial investment			
One-time cost savings			
First year: labor costs			
First year: other costs			
Stabilized: labor costs			
Stabilized: other costs			
Start-up management fees			
Opportunity costs			
INCREMENTAL BENEFITS			
First year revenue			
Stabilized revenue			
Annual labor savings			
Annual other cost savings			
Service improvement			
Quality improvement			
Competitive gain			
Social benefit			
RETURN			
First year income			
Stabilized income (annual return)			
Payback (months)			
ROI			

Cost/Benefit Analysis

## PLANNING

## 3b Market positioning (Competitor Grid)

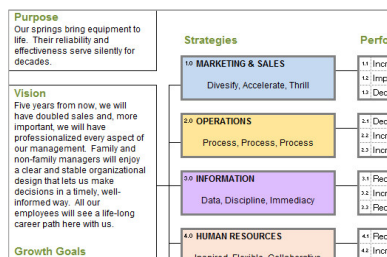
- **Lesson:** Only the customer can say if your products are really better
- **Project:** Create a brutally honest comparison with 3 top competitors

## 4a Crafting a vision (5-Year Look)

- **Lesson:** Declaring your strategic plan to the board requires confidence and skill
- **Project:** Create an inspiring, yet realistic vision for your organization or project.

## 4b Strategic planning (Goal Tree)

- **Lesson:** How to create balanced priorities and metrics
- **Project:** Abstract and confirm your organization's strategic plan
- **Reflection:** What are the moral and ethical issues of managerial power?



Goal Tree

HIGHLIGHTS OF OUR ORGANIZATION			
	5 YEARS AGO	TODAY	5 YEAR
Key product/service:	WidgetOne	Widget family	Widget
Revenue:	\$15,000,000	\$31,500,000 (+60%)	\$45.5M
Income:	\$500,000	\$2,100,000	\$3.7M
Employees:	12	20	25-30
Customers:	100	210	400-450
Facilities:	10,000 SF, 1 building	15,000 SF, 1 building	Address
STRUCTURE	Managed by founders Business plan	Strategic plan JV with ACME Supply Advisory board	ESOP Nation
MARKETING & SALES	Static website 3 independent sales reps	Online ordering Regular market research 3 inside sales reps	Control Robust Target
OPERATIONS	3 processing machines 3 key suppliers	Quality management system ISO 14000 First robotics	Output RFID 5th sig
INFORMATION	ERP	New CRM New business intelligence	All data Updated
HUMAN RESOURCES	No HR leader	HR Director	State
		Employee manual	Comes

5-Year Look

## IMPLEMENTATION

## 5a Resource allocation (Projects Summary)

- **Lesson:** Projects stall and staff burn out if time is not very carefully managed
- **Project:** Summarize, then optimize all that the cohort or your own team is working on

## 5b Project planning (1-Page Project Planner)

- **Lesson:** Most projects fail on Day 1 because terms and goals were unclear
- **Project:** Plan a project together
- **Reflection:** How has this training changed you as a person?

Updated: May 1, 2018									
	Priority	Ready	Stalled	PM	\$Ks	Hrs	Goals	Con	Prima
<b>STRUCTURE</b>									
Create campus master plan	H	M	H	LM	30.0	200	111	Facil	Set
Plan board self-evaluation	M	L	L	DT	0.0	24	113	Using	
Reassess new product ideas	L	L	L	BP	180	60	3.12	Invet	
<b>MARKETING &amp; SALES</b>									
Update logo	L	M	L	BD	9.0	80	2.1	Using	
Complete competitor research	H	L	L	KL	12.0	24	2.5	Telep	
Plan annual customer satisfaction survey	H	M	L	KL	2.0	36	2.2	Use s	
<b>OPERATIONS</b>									
Change steel vendors	M	L	L	BP	20.0	80	3.1	Conti	
Upgrade packaging machine	M	M	M	LM	25.0	120	3.3	Envel	
Rework assembly line X	M	H	H	DT	250.0	1200	3.3	After	
<b>INFORMATION</b>									
Update ERP module X	H	M	H	AA	30.0	80	4.1	Update	
Install and train in business intelligence software	M	L	L	KL	26.0	100	4.2	Conti	
Move office applications to the cloud	L	L	L	KL	12.0	36	4.3	Fun C	

Projects Summary

Project name: Run three focus groups					
Primary goal: Learn top 3 likes and 3 dislikes of core products					
Secondary goals					
1. Goal 2.2: Increase Net Promoter Score from 7.8 to 9.0					
2. Goal 3.2: Reduce SKUs from 150 to 125					
3. Goal 6.3: Reduce Sales Costs from 4.5% to 3.0%					
Metric(s)		Net Promoter Score			
Deadline		August 31, 2018			
SITUATION		TEAM			
Division	Commercial Products	Supervisor	Joan (CEO)		
Unit	Widgets	Manager	Tim (VP Marketing)		
Department	Marketing and sales	Team Bert (analyst), Jane (sales)			
Location	Chicago, IL USA				
TASKS		RESOURCES			
The team began by studying definitions and best practices.		Lead	Budget	Spent	Hour
1. Plan (initial): Establish questionnaire with consultant		Bert	\$1,500	\$1,250	10
2. Plan (final): Select internal facilitator, venue and panel		Bert	\$1,000	\$1,565	12
3. Win approval: Get budget approval if over \$10,000		Bert	\$0	\$0	1

1-Page Project Planner

## 6: CAPSTONE

In our sixth and last session, you'll apply all you've learned to a big decision in your organization, assess its return on investment and present your decision, including a short, inspiring message.

**We end with a celebration!**