

*Your organization—whatever sector or size—can only reach its big goals when everyone works together, making good generalists invaluable.*

## Who is a generalist manager?

A *manager* helps people work together. *Supervisors* are managers who work with people in the same area, but *generalists* must work cross-functionally. While most leaders are also managers and *vice versa*, they're different roles: this white paper is about generalist managers.

### Titles

- CEO
- President
- Administrator
- Managing Partner
- Executive Vice President
- General Manager
- Branch or Unit Manager
- Regional Manager and Brand Manager

*Many roles mix supervising one area and working cross-functionally: Officer, Practice Leader, Director, and Vice President. Board members and Project Managers are often generalists, too.*

## Why are generalists valuable?

Generalists measurably improve several Key Performance Indicators (KPIs) by fostering cross-departmental collaboration. Even a 1% improvement in any of these measures is substantial:

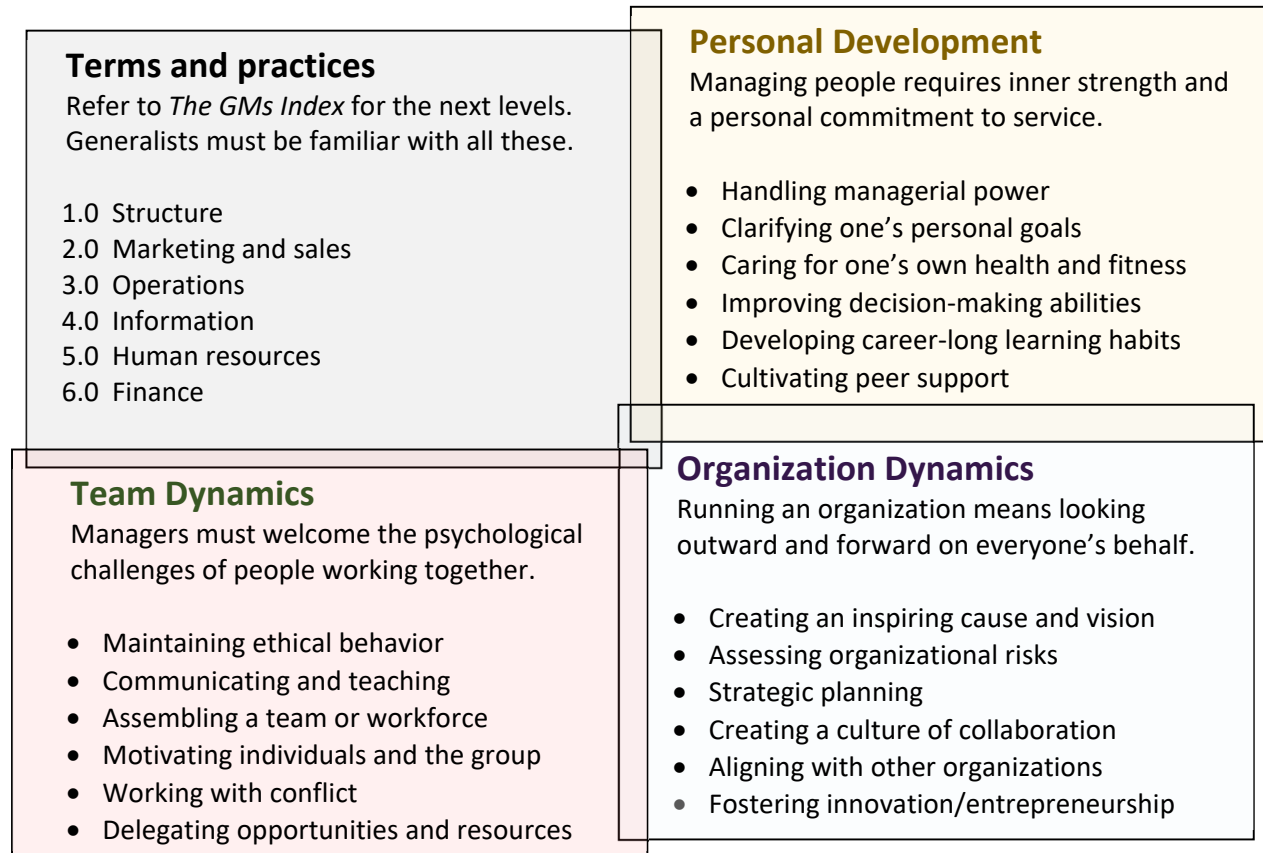
- Sales Growth
- Productivity
- Quality
- Customer Satisfaction
- Retention

Listen to experienced managers prove the financial value of good generalists: *The Five KPIs of Manager Value*, at <https://uwm.edu/business/executive-education/podcast/>

## What skills and knowledge do I need to be a generalist?

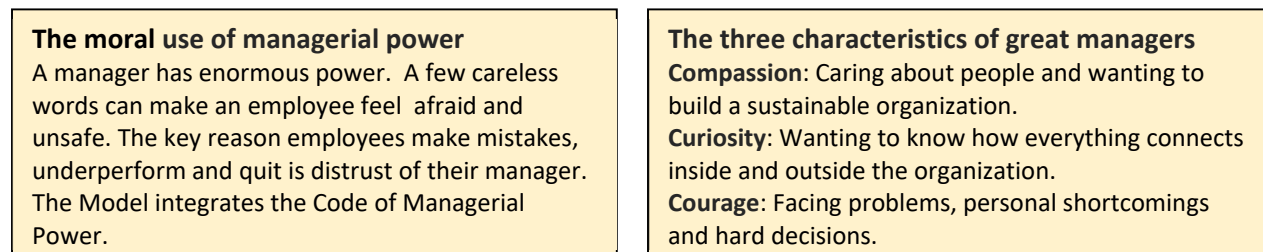
### *The Milwaukee Model of General Management™*

The Milwaukee Model is flexible: managers in all sectors and size organizations can use it. Its matching Self-Assessment, included at the end of this paper, will help you establish your own starting points among the four quadrants.



## What personal characteristics must a good generalist have?

Managers need **moral strength** and **depth of character** as well as skills and knowledge.



## What is a generalist's career path?

Organizations and countries have different titles for managers, but this chart describes a typical evolution of the generalist's career, which might be part of a succession plan.

<b>Supervisor</b>	Works within one area. Has worked on Personal Development and Team Dynamics from the Milwaukee Model.
<b>Generalist</b>	Has profit and loss responsibility for a single line or unit, which requires understanding how all management disciplines interact.
<b>Executive</b>	A manager of managers, often responsible for several organizational units, departments or regions.
<b>Chief executive</b>	Responsible for everything, including influencing external forces. No peers in the organization and under scrutiny by the board or owners.

## What's the best way to learn to be a generalist?

Like students in any field, one should start with the standard framework of knowledge, such as the Table of Elements, musical notation or the taxonomy of plants and animals.

As the standards body for general management, The Center hosts **The GMs Index of Terms** (see [www.theindex.net](http://www.theindex.net)) and **The GMs Toolkit**, fifteen 1-page tools for the generalist's basic duties: planning, analysis and overseeing projects. *Collaboration and growth are impossible until every manager uses the same terms, tools and practices.*

The Center provides development opportunities from introductory workshops to certificate programs, coaching for experienced managers, and CEO roundtables. Management is a lifetime study, and The Center's Workgroups reinforces and evolves one's abilities. The Center is a community of life-long learners from every industry, recognized for their contributions.

## How do I transition from specialist to generalist?

The transition from specialist to generalist means more than gaining new skills and knowledge. It requires a change in thinking and very different ways of working. There are three qualifying questions for new generalists:

*Do you like to help other people solve problems?*

Specialists earn recognition, money and satisfaction solving technical problems. But a generalist likes to help *other* people solve problems: they ask questions that help others see the issues, even if they themselves know the answers. They get their satisfaction indirectly, which can take patience.



*Are you genuinely interested in the science of management?*

Most specialists are inward-facing, wanting to understand more and more details about their specialty. A generalist has an outward-facing kind of curiosity. They need to know a little about a lot of things within and outside the organization.

*Are you comfortable with ambiguity?*

For many specialists, success is black and white. The code works. The case is won. The numbers tie out. Generalists, on the other hand, can make decisions where nothing is certain, intuition is valued, and the job is never 100% done.

Generalists are rare and valuable. Without them, specialists wouldn't have jobs and organizations can't meet their big goals. But many schools push specialization because entry-level jobs are specialized. Becoming a generalist takes time and experience.

### What is management's social purpose?

*Personal fulfillment:* Too many people come to work feeling they're not contributing fully to something that matters. Managers help people work together to achieve something great and The Center helps them do that. Managing is a helping profession and to many a spiritual practice.

*Ethics:* The Center put *1.1.1.1 Code of ethics* first in The GMs Index to signify the primary importance of good behavior. The Center's own code of ethics is found at the About page.

*Inclusion:* The Center's mission includes breaking down barriers to collaboration not only within organizations, but across cultural borders. During the Second World War, scientists among the warring nations continued to work together. By equipping its members with a common language of management, The Center fosters the positive shared experiences that transform intolerance into friendship.

### How can I try these ideas?

There are several ways to get familiar with what The Center offers, quickly and at no cost:

1. Look over the Self-Assessment appended to this paper
2. Click through The GMs Index. A link to an introductory video is on the home page
3. Visit the Events page to find an introductory session
4. Read the instructions and try The ¼-Page Meeting Planner from The GMs Toolkit
5. Ask to try one of the Workgroup sessions. See the Workgroups page.
6. Contact the Center at [info@theindex.net](mailto:info@theindex.net) or US 608 260 9300

END

<b>Manager:</b>	name
<b>Supervisor:</b>	name
<b>Date:</b>	date

Refer to the Milwaukee Model of General Management™

**A manager helps people work together,** demanding different *kinds* of skills, different *kinds* of knowledge and great inner strength. Even experienced chief executives can always learn more about their industry, management practices, human dynamics—and themselves. A *supervisor* is a manager who works in one area; a *generalist* is a manager who works cross-functionally. Most leaders and generalists and vice versa, but they’re different roles.

**People are complicated.** People are always changing. They respond differently to change and stress, failure and success. People’s behavior also changes when someone is added or removed from their group.

**Above all else, a good manager wants to help others succeed.** They feel passionately that *their* success is a direct function of how they help *others* meet their goals.

## Instructions

1. Manager and supervisor discuss the Model
2. Manager assesses themselves
3. Manager and supervisor discuss the assessment and agree on what to learn that year
4. They choose a development activity (ideas below) and “live” projects
5. They evaluate progress and adjust as needed
6. Toward the end of the year, they evaluate the manager’s performance

## Development activities

- Projects or new responsibilities, learning specific tools
- Reading and reflection
- Workshops
- Discussion in a mentor/protégé relationship
- Job rotation
- Participation in a peer group
- A certificate in general management or practice management

*The Center offers coaching, training and peer groups at all levels.*

## Standard terms and practices

The standard body of knowledge for general management practices. For practical decision-making, applying general principles and industry knowledge.

Open The GMs Index at [www.theindex.net](http://www.theindex.net). Click through levels 1, 2 and 3 for definitions and context. Use the Management Self-Audit tool in The GMs Toolkit if helpful (members only).

Self-rating scale: 1 to 5. 1=Area of focus. 5=Mastery in current role. X=Not yet relevant.

	<u>Self-rating</u>
<b>1.0 Structure</b>	_____
<b>2.0 Marketing and sales</b>	_____
<b>3.0 Operations</b>	_____
<b>4.0 Information</b>	_____
<b>5.0 Human resources</b>	_____
<b>6.0 Finance</b>	_____

Notes

<i>Top 3 things to work on this year (development activity)</i>	% comp.
1.	
2.	
3.	

## Personal Development

Managing people requires inner strength and a personal commitment to service.

Self-rating scale: 1 to 5: 1=Area of focus. 5=Mastery for current role. X=Not relevant. See samples of tools at The GMs Toolkit.

### Self-rating

**Handling managerial power** [LinkedIn: *Power is the Moral Test of a Manager*] \_\_\_\_\_

Read the Code of Managerial Power to learn how much your power staff can help and hurt them. Knowing how to monitor and improve how you use managerial power in different situations.

**Clarifying one's personal goals** \_\_\_\_\_

Knowing what you want to be and achieve *and* who you want to be as a person. Thinking objectively about the sources of your beliefs and attitudes. Being confident you can put other people first.

**Caring for one's own health and fitness** \_\_\_\_\_

Understanding the level of physical and mental fitness needed to be an attentive and engaged manager. Setting a positive example of sound habits and sensible self-discipline. Avoiding burnout.

**Improving decision-making abilities** (tool: Cost/Benefit Analysis) \_\_\_\_\_

Using different kinds of quantitative and qualitative information to help your staff create good solutions. Being aware of your own conscious and subconscious processes for making different kinds of decisions.

**Developing career-long learning habits** \_\_\_\_\_

Accepting that even successful chief executives always have things to learn. Having learning goals, healthy personal interests and channels for finding facts. Seeking challenging perspectives.

**Cultivating peer support** (e.g., Center Workgroups) \_\_\_\_\_

Actively and regularly seeking peers for information, ideas, challenges and moral support. Purposely seeking new acquaintances who will challenge your ideas as well as your attitudes and beliefs.

### Notes

<i>Top 3 things to work on this year (development activity)</i>	% comp.
1.	
2.	
3.	

## Team Dynamics

Managers must welcome the moral, ethical and psychological challenges of people working together.

Self-rating scale: 1 to 5: 1=Area of focus. 5=Mastery for current role. X=Not relevant. For background, refer to relevant terms and Approved Resources in The GMs Index.

### Self-rating

#### **Maintaining ethical behavior**

Defining morals and ethics. Understanding the letter and spirit of your Code of Ethics. Anticipating ethical dilemmas and leading those discussions. Responding to unethical or possibly unethical behavior.

#### **Communicating**

Listening with comprehension, sympathy and objectivity. Sharing ideas in writing, speaking and images. Inspiring people by making the big goals vivid and exciting.

#### **Creating a team or workforce (tool: Management Self-Audit)**

Knowing the mix of skills, experiences, time and support for a project or process. Creating the right balance of perspectives and personalities. Knowing when to remove someone or to disband the group.

#### **Motivating individuals and groups**

Knowing each of your staff well enough to stimulate their particular thinking and energy. Creating conditions for enthusiastic collaboration. Knowing when and how to provide discipline.

#### **Working with conflict**

Having the sensitivity, patience and skill to direct each staff member. Having the firmness and skills to resolve conflicts promptly and constructively. Eliminating barriers among departments.

#### **Delegating opportunities and resources (tool: Projects Summary)**

Understanding the staff's workload and personal and collective capacity. Creating assignments that are challenging, but not overwhelming. Managing with a minimum of intervention.

### Notes

<i>Top 3 things to work on this year (development activity)</i>	% comp.
1.	
2.	
3.	



## Organization Dynamics

Running an organization means looking outward and forward on everyone's behalf.

Self-rating scale: 1 to 5: 1=Area of focus. 5=Mastery for current role. X=Not relevant. For background, refer to relevant terms and Approved Resources in The GMs Index.

### Self-rating

#### **Creating an inspiring cause and vision** (tool: 5-Year Look) \_\_\_\_\_

Understanding if a challenge will matter deeply to every employee. Expressing the facts and feelings of that challenge so everyone will eagerly take on the risks and discomforts of change.

#### **Assessing organizational risks** (tools: Risk Assessment) \_\_\_\_\_

Having the information to know what could go wrong in each management discipline (see Standard terms & practices). Knowing if the organization can add risks or isn't risking enough.

#### **Strategic planning** (tool: Goal Tree) \_\_\_\_\_

Creating a challenging, yet realistic and balanced mix of short- and long-term goals to advance the organization's cause and vision. Keeping the organization focused on the goals.

#### **Creating a culture of collaboration** \_\_\_\_\_

Understanding how all the formal and informal rules of behavior help everyone contribute the most, individually and collectively. Knowing when and how to reshape those rules.

#### **Aligning with other organizations** (tool: Integration Checklist) \_\_\_\_\_

Working to the mutual benefit of new and existing customers, vendors and affiliates. Anticipating and then adjusting to changes to any part of that overall network.

#### **Advocating in the community** \_\_\_\_\_

Working with industry, community and governmental bodies to protect your organization's reputation, ensure fairness, open opportunities, and protect against threats outside your own control.

### Notes

<i>Top 3 things to work on this year (development activity)</i>	<i>% comp.</i>
1.	
2.	
3.	