Chapter 1: The Supervisory Challenge and Management Functions

After studying this chapter you will be able to:

1. Explain the demands and rewards of being a supervisor.
2. Identify and discuss the major demographic and societal trends that will affect supervisors.
3. Summarize the challenges supervisors face in fulfilling managerial roles.
4. Explain why effective supervisors should possess a variety of skills.
5. Define management and discuss how the primary managerial functions are interrelated.
Every chapter in this text begins with a section titled “You Make the Call.” After reading each case, decide which decision(s) you would make or the course(s) of action you would take as the person described in the case. As you read each chapter, think about how the concepts apply to the opening scenario. After you finish each chapter, compare your ideas to the suggestions in the section titled “What Call Did You Make?” This section appears just before the summary for each chapter.

You are Leslie McGuire, a recent graduate of the business administration program at Shelbourne Community College.

During your three years at college, you worked part-time in the production department of Brant Coatings Ltd., a manufacturer of industrial paints and adhesives. The work was physically demanding and tedious, but the pay was good and your supervisor adjusted your hours to accommodate your school schedule.

Since graduating three months ago, you have continued to work part-time at Brant while conducting a search for full-time employment. You have applied for jobs in a variety of fields, but are not really sure where your strongest interests lie. You studied a wide range of business subjects in college, and found most of them very interesting. Many of your friends specialized in areas such as accounting or marketing, but you preferred to take a general business program, thinking that perhaps some day you would like to run a business of your own.

Yesterday, your supervisor, Colleen Grenier, took you aside during your shift. “Leslie,” she began, “I’ve always been impressed by your good judgment and your hard work. You get along well with your coworkers and you’re always looking for better ways to get the job done. The production supervisor on the night shift is retiring next month and I would like you to apply for the job. I think with your front-line production experience and your business administration diploma, you’d really be a good match for the job. There are some long-time production people who might want the job, but I don’t think they’ve shown the initiative and work ethic that you have. I’ve already talked to the plant manager, and he’d like to interview you tomorrow afternoon if you’re interested. What do you think?”

You have mixed feelings about the possibility of being a night shift supervisor. You have enjoyed working at Brant, but always intended to leave the company once you finished college. You have a lot of good ideas about how to improve production methods, and the opportunity to lead a group could be very rewarding. On the other hand, you know that most of the production employees have been at Brant for many years, and seem very set in their ways. You wonder how well you would be accepted and whether the transition to supervisor would be difficult, especially since you were always viewed as the “part-time kid.”

This conversation has taken you by surprise. You need to decide whether to meet with the plant manager tomorrow afternoon. If you decide to attend the meeting, you wonder how you should go about preparing for it. Finally, if offered the job, you must decide whether you will accept it.

You make the call!
Virtually every aspect of life has undergone major changes during the past several decades. Technology has altered the way we communicate, live, and work. “Surfing the Net” is a daily activity for people of all ages. The stock market has seen wide fluctuations that have left many investors shaken. Long-time pillars of Canadian business such as Nortel Networks Corp. and Air Canada have struggled to reorganize and survive in the face of new competition and rapidly changing market conditions.¹

There is little doubt that change will continue to challenge every organization. But change brings not only uncertainty and chaos, but also opportunities to the organizations and individuals who can best adapt to the new landscape (see Contemporary Issue box).

If they and their organizations are to survive, managers at all levels must be at the forefront of planning for and coping with trends, factors, and problems requiring more effective management.

This book focuses primarily on the first tier of management, which generally is referred to as the supervisory level, or supervisory management. Supervisors are first-level managers in charge of entry-level and other departmental employees.

Critical commentaries on the North American business system indicate that the traditional notions of getting a job done through power and positional authority are no longer effective. Today’s managers and supervisors, whether in factories, nursing care units, business offices, retail stores, or government agencies, must realize that reliance on authoritarian direction and close control will not bring about the desired results. Supervisors are being challenged to improve their skills and to obtain better productivity from all of their human resources. In many organizations the role of the supervisor will continue to change drastically. The term supervisor may even be eliminated from the vocabulary of some firms, being replaced by terms such as team leader, facilitator, or coach.

Supervisory work has become more complex, sophisticated, and demanding, and it requires professional and interpersonal skills.² Supervisors are in the unique position of being the only managers in the organization who oversee front-line workers. Supervisors are instrumental in ensuring that the goals and strategies formulated by middle and upper-level managers are actually implemented “in the trenches.” In many organizations, supervisors are typically the only representatives of management with whom workers have contact on a daily basis. Effective supervisory practices, therefore, are critical to ensuring that the workforce will support and work to achieve management’s goals and objectives.

As depicted in Figure 1-1, the job of the supervisor is both rewarding and stressful. The ideas presented are not all-inclusive, but they illustrate some of the rewards and challenges associated with the supervisory role.

Although the first-line supervisory position is one of the three levels on the management hierarchy (see Figure 1-2), it is the level in which most people obtain their first management experience. You have probably already developed a picture of what supervisory management is all about. Your past experiences as a student, customer, employee, and/or supervisor have allowed you to observe some of the prevailing supervisory practices. In all likelihood, your observations...
Chapter 1: The Supervisory Challenge and Management Functions

CONTEMPORARY ISSUE
Lace up Your Nikes®—Do You Have What It Takes to Thrive in the Nimble Organization?

Managing your career in the new millennium feels a lot like playing tennis. You arrive at the courts expecting a friendly game of amateur tennis, only to find both Williams sisters lined up on the other side of the net! Surviving and thriving in today’s “nimble corporations” require that employees at all levels must learn to be quick on their feet, ready to adapt to change, and quick to embrace opportunities created during times of upheaval.

It’s easy to find examples of Canadian businesses that have struggled to survive in the past decade. On April 1, 2003, Air Canada filed for bankruptcy protection in the wake of dramatic turbulence in the global airline industry following the terrorist attacks of September 11, 2001. Canada’s telecommunication giant, Nortel Networks Corp., laid off 50,000 people in 2001 alone. In September 2003, JDS Uniphase, a fibre-optic components maker, moved its headquarters from Ottawa’s “Silicon Valley North” to San Jose, California. The relocation reduced the company’s Ottawa workforce to 600, down from a peak of 10,000 people.

But on the other side of the ledger, there are examples of Canadian businesses that have been able to survive—and even thrive—in a rapidly changing business environment. During the same time that Air Canada suffered dramatic losses, Calgary-based WestJet’s performance soared. WestJet began as a “scrawny, very local, fledgling” in 1996 and has never looked back. WestJet has earned a profit in each of its 26 budget quarters, and is expanding its routes to include international destinations. It is widely known for the quirky corporate sense of humour that accompanies its no-frills approach to travel. WestJet has demonstrated an ability to find market opportunities and thrive when others are struggling. “It’s part of our culture to have fun and do things a little bit differently,” says Siobhan Vinish, head of public relations.2

Daryl R. Conner, author of Leading at the Edge of Chaos: How to Create the Nimble Organization, says that successful organizations must learn to operate in a state of “perpetual unrest.” He advises organizations to learn to “adapt quickly to changing market conditions, while at the same time conducting human due diligence—a measure of people’s capacity to absorb change … so there is enough momentum to face the next change and the one after.”3

But striving to be nimble has resulted in a significant shift in the employment relationship. Gone are the days of “jobs for life” when employers thought “if you show loyalty to the employee, the employee shows loyalty to you and you both benefit.”4 The need to react quickly to changing market conditions often means that organizations cut jobs, contract out, and hire temporary workers instead of permanent staff—changes that have left many Canadian workers wondering about the security of their jobs.

Supervisors will be affected significantly when organizations strive to become more nimble. The increase in contract and temporary workers will challenge a supervisor’s ability to keep the entire workforce motivated to excel. The pace of change will increase and the supervisor will have to guide his or her employees through some unsettling periods of unrest. Change will be the rule, not the exception and the line between rapid change and chaos may not always be clear. Leading in this environment will clearly challenge any supervisor’s skills.

So, lace up your shoes and get your tennis racket ready. Here comes the next serve!

have made you aware that there are distinct differences among supervisors in terms of how they apply supervisory concepts and in how effectively they manage their departments.

In the past, many managers achieved their positions on the basis of practical experience they obtained as a first-level supervisor. Today, the study of management has become more formalized, and many prospective supervisors learn management concepts and principles in a classroom setting. This book is intended for both practising and potential supervisors, especially students who are studying the field of management. It is designed to help you develop the supervisory skills needed to succeed in today’s rapidly changing organizations.

As an Appendix to this chapter, we include a section called “Getting into Supervision,” which will identify and discuss some of the important factors to consider if seeking a supervisory or management position. The Appendix also includes a number of career tips that are essential for those aspiring to be supervisors and for almost any type of career planning.
As highlighted in this chapter’s Contemporary Issue box, rapid change is no longer the exception—it is the rule in today’s organizations. In order to keep their organizations responsive to changing market conditions, supervisors must understand and respond to many complex environmental factors and trends (see Figure 1.3). Therefore, we will examine some major demographic and societal considerations that are likely to affect the supervisory management position. Although every supervisor is responsible for managing numerous resources, unquestionably the most important, overriding aspect of supervision is the management of people. Therefore, the nature of the workforce should be of vital concern to the supervisor who plans for the future. Finding and developing qualified people have always been among the most important supervisory responsibilities. However, the traditional challenges of attracting and retaining the most qualified employees may be superseded by the more acute supervisory challenge of leading and motivating an increasingly changing workforce. The most significant characteristic of this changing workforce will be its diversity. Work groups will be composed of employees who differ in culture, ethnic background, gender, age, educational level, race, and lifestyle characteristics. The supervisor will need to get people from many different cultures to work together.

Population and Workforce Growth

Despite the rather low birth rates of recent decades, both the population and the workforce are growing. It is estimated that the Canadian population will grow at a modest rate from a 1996 level of about 30 million people to nearly 32.2 million people by 2006. Assuming a 60 percent employment/population ratio, the workforce can be projected to increase by 1.3 million during this period.
Immigration continues to add a significant portion to the workforce growth in Canada. In 2001, 5.4 million people, or 18 percent of Canada’s total population, reported that they were born outside the country, the highest level in 70 years. Eighty-five percent of immigrants to Canada came from developing countries (see Figure 1-4) and bring a variety of skills and experience with them. Racial minorities in Canada are expected to increase significantly from the present level of 13 percent of the population. Canadian organizations and their supervisors must continue to find ways to capitalize on the talents of this diverse workforce.

While managing a diverse workforce may present some challenges, it also presents numerous opportunities for supervisors to build on the strengths of individuals and groups. In the following sections, we intend not only to create an awareness of the differences to be expected but also to raise consciousness. Supervisors must understand the rights of both their employees and their employers, regardless of workforce differences. Supervisors must recognize the value of a diverse workforce and their own need to become more adaptable to
change. Further, perhaps more than ever before, supervisors will have to be scrupulously fair in supervising diverse groups of employees through nondiscriminatory and progressive practices.

### Changing Age Patterns

Both the population and the workforce in Canada are getting older. The average age of the workforce in 2001 was 39 years of age compared with an average of 35.8 years in 1981. In 2001, about 62 percent of the workforce was over 35, up from about 47 percent 20 years earlier. This age group normally provides the highest percentage of people who occupy supervisory and other management positions. In the future, therefore, more people will be available to fill these positions, and the competition for supervisory jobs will be keen.

The growth in the 37 to 55 age group poses potential problems for younger workers who are waiting to progress into supervisory positions; there may be a glut of younger employees looking for opportunities as they wait for the large group of older workers to retire. In Ontario, legislators are debating the merits of abolishing mandatory retirement at age 65. Proponents of this change argue that the Canadian economy will be strengthened if the skills of older workers can be retained in the workforce. Critics argue that this move would reduce opportunities for younger workers. Mismatches between the number of employees desiring advancement and the number of opportunities available may lead to increased dissatisfaction and greater turnover as younger workers leave to seek positions elsewhere.
At the opposite end of the spectrum, there will be relatively fewer young people in the workforce as a result of the historical decline in Canada’s birth rate. Statistics Canada data show that the 20 to 34 age group has declined from 5.7 million to 4.9 million between 1991 and 2001. Although it is unfair to make sweeping generalizations, many younger workers today are struggling with the fact that their generation will have to work harder for the lifestyle that their parents may have attained relatively easily. Some younger workers become disillusioned when they realize that the effort “that earned their parents two cars, a nice house and cottage at the lake hardly wins them a job flipping burgers.” Younger workers are realizing that there are no “jobs for life” and that they must become more entrepreneurial and self-reliant in the changing world of work. Neil Howe and William Strauss, authors of the book *Millennials Rising*, state that young people born since 1982 prefer group activities and want clear rules set for them—a combination that is distinctly different from their mostly baby-boomer parents. The researchers believe that this group of new entrants to the workforce, called by some “Y-ers” or “millennials” are more spiritual and less individualistic than their parents, characteristics that should be considered when trying to understand their work motivations. There is little question that the success of supervisors will depend to a considerable extent on those supervisors’ abilities to tap into the interests and motivations of all members of the workforce.

**Women in the Workforce and Related Issues**

Probably the most dramatic change has been the rapid increase in both the number and percentage of women in the workforce. The number of employed women soared by close to 50 percent in the last two decades to more than 7.5 million, while the number of men working rose only 18 percent to 8.5 million.
The participation rate (the percentage of working women who are in the workforce) rose from 56.8 percent in 1995 to 65.2 percent in 2001. In recent years, women have assumed many jobs formerly dominated by men.

While the movement of women into the workforce has significantly increased the skills available to Canadian corporations, this trend has also brought with it a number of challenges for employers that are likely to continue. Two-income families face conflict between work and home, and both male and female employees may bring their family concerns to work. Supervisors need to understand that their employees’ work performance may be negatively affected by this conflict between job and family obligations. In order to attract and retain the most qualified employees, employers may need to provide high-quality child-care facilities and continue to experiment with different types of workdays and work weeks, such as flextime (in which employees choose their work schedules within certain limits), job sharing (in which two or more employees share a job position), telecommuting (in which the employee works at home and is linked to the office by computer and modem), and the four-day, 10-hour-a-day work week. Given the increasing numbers of single working parents and the concern over the quality of child-care services, progressive firms are likely to implement these types of working arrangements in an effort to retain talented employees.

A recent study indicates that working mothers go to great lengths to keep family matters out of the workplace, and that it is more likely that work-related issues will intrude on their home lives. A demanding job leaves almost half of parents too tired to do things with their children; 60 percent of working mothers say they have to put work ahead of family at least some of the time and feel less successful in their relationships with spouses, children, and friends. Efforts to help employees balance the responsibilities of home and job will require better supervisory skills and training to help all employees handle work/life issues.7

Another major challenge for supervisors will be to ensure that sexual harassment does not occur in the work environment. Sexual harassment has been perpetrated against both men and women, but the latter occurs much more frequently. Recent court decisions have reinforced the fact that supervisors must take action to prevent harassment and must respond immediately when incidents of harassment are reported.

Growth of Racial Minorities in the Workforce

Figure 1-5 outlines the importance of immigration in Canada by region and the percentage of immigrants who arrived in 1991 to 2001.

The growth in the proportion of visible minorities in selected cities shows significant increases as noted in Figure 1-6.

Many immigrants come to Canada with professional designations and advanced skills. The challenge for Canadian organizations will be to tap into this source of talented workers. One of the many responsibilities of supervisors is to attract and retain qualified employees. Yet “there is a tendency to hire what you know. If you have two identical resumes, you may tend to go with a domestic candidate”8 says Barbara Nowers, director of Career Bridge, an organization overseeing a pilot project in Ontario to help immigrants obtain paid internships in Canadian organizations. Announced in 2003, the pilot project aims to help immigrants break into the Canadian job market in their field of expertise. “Part of the project’s goal will be to educate employers. That means taking a chance on a candidate whose language skills may not be perfect but will change exponen-
Some sectors of the Canadian economy face chronic shortages of skilled workers, and supervisors who recognize the potential of the immigrant talent pool may find a way to relieve these shortages.

**Opportunities for Women and Minorities**

Historically, some firms relegated women and minorities to lower-skilled and lower-paying jobs and did not fully utilize the potential contributions that many have to offer. For some people, there was an invisible barrier—a glass ceiling—that limited advancement. While women have been appointed to the CEO or president position in companies such as Home Depot Canada, Extendicare, and Xerox Canada, a subtle barrier may still be in place in some firms. To compound the problem, some organizations have concentrated women and minority employees into certain occupations. These glass walls that segment employees deny them the opportunity to develop the variety of skills necessary for advancement.

**FIGURE 1-5** Importance of immigration.

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<td>Canada</td>
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<td>Nfld. and Lab.</td>
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<td>P.E.I.</td>
<td>73,635</td>
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<td>0.5</td>
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<tr>
<td>Nova Scotia</td>
<td>451,375</td>
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<td>1.1</td>
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<tr>
<td>New Brunswick</td>
<td>371,805</td>
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<td>0.6</td>
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<tr>
<td>Quebec</td>
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<td>10.5</td>
<td>3.3</td>
</tr>
<tr>
<td>Ontario</td>
<td>6,086,820</td>
<td>29.1</td>
<td>9.2</td>
</tr>
<tr>
<td>Manitoba</td>
<td>585,425</td>
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<td>3.1</td>
</tr>
<tr>
<td>Saskatchewan</td>
<td>512,240</td>
<td>5.0</td>
<td>1.2</td>
</tr>
<tr>
<td>Alberta</td>
<td>1,696,760</td>
<td>16.2</td>
<td>4.4</td>
</tr>
<tr>
<td>British Columbia</td>
<td>2,059,945</td>
<td>27.1</td>
<td>9.0</td>
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<tr>
<td>Yukon</td>
<td>17,945</td>
<td>12.4</td>
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<tr>
<td>N.W.T.</td>
<td>20,785</td>
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<td>2.5</td>
</tr>
<tr>
<td>Nunavut</td>
<td>11,355</td>
<td>3.4</td>
<td>0.7</td>
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Source: Statistics Canada.


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<tr>
<td>Canada</td>
<td>4.7</td>
<td>9.4</td>
<td>13.4</td>
</tr>
<tr>
<td>Montreal</td>
<td>5.2</td>
<td>11.0</td>
<td>13.6</td>
</tr>
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<td>Toronto</td>
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<td>25.8</td>
<td>36.8</td>
</tr>
<tr>
<td>Vancouver</td>
<td>13.9</td>
<td>24.0</td>
<td>36.9</td>
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Source: Statistics Canada.
There is some encouraging evidence that glass ceilings and walls may be less of a problem in some Canadian industry sectors than in their U.S. counterparts. A recent study prepared for Women in Capital Markets, a Toronto-based advocacy group for women in the investment banking industry, concluded that women working in the U.S. investment banking industry were “more likely than their Canadian counterparts to cite discriminatory policies and practices as the reasons for their lack of advancement.” To advance in their field, however, both Canadian and American women agreed that the key is to “exceed expectations. Be a star. Be perceived as a hard worker.”

Women and minorities also face disparities in their earning power. Statistics Canada census data from 2001 indicate that women earn 70 cents for every $1 men earn in full-time jobs, while male immigrants who had been in Canada one year earned 63 cents for every dollar earned by men born in Canada. Organizations must put into place policies and procedures to ensure that all workers are paid fairly for the contribution they make.

A survey conducted by Deloitte and Touche LLP found that women are evenly divided between being “fairly satisfied” and “not too satisfied” with the overall status of women in business today. By comparison, men perceive that there are higher satisfaction levels among women in general. Other findings of the poll include:

- More than two-thirds of the women believe that a woman needs more experience or more education than a man does to be considered for the same job.
- More than half of the females believe that women work harder than men.
- Men and women agree that the presence of women in the workforce has had positive effects on business. The effects most commonly cited by both men and women are “a greater importance placed on families” and “a greater awareness and acceptance of different styles and viewpoints.”
- Both men and women see a male-dominated corporate culture as a major barrier to women succeeding and agree that women have a tendency to be excluded from the informal communications network.
- Women who work for smaller companies express higher levels of satisfaction and are more likely to be ahead of their own expectations for their career. The authors conclude that this may be because many smaller companies afford women the opportunity to affect decisions and take control of their own careers, better balance work and family life, and make a difference in the lives of others—all of which are important motivators for both genders.

All employees will continue to need an effective combination of educational and job-related experiences to provide them with opportunities to develop their talents. Organizations will be expected to design programs to attract and develop women and minority employees, to ensure that they have access to a full range of career opportunities, and to ensure that they are paid fairly for the work they do.

**Educational Preparation**

Accompanying the changes in the racial and ethnic composition of the workforce are educational preparation factors that also will challenge supervisors in the future. More people than ever before have some postsecondary education. Nearly two-thirds of high school graduates go on to college or university. In 2000, 41 percent of Canadian adults aged 25 to 64 had a college or university education, the highest of all industrialized nations, ahead of 37 percent in the United States and 34 percent in Japan.
Some forecasters believe that we may soon encounter problems with an overeducated workforce. That is, more and more college- and university-educated employees will compete for jobs that do not necessarily require a post-secondary education to perform. The intense competition for jobs and the increase in lower-level service industry jobs may create underemployment. Underemployment occurs when employees bring a certain amount of skill, knowledge, and ability (SKAs) to the workplace and find that the job lacks meaning and/or the opportunity to fully utilize their SKAs. The challenge for supervisors will be to create a workplace environment that stimulates the under-employed. The current abundance of college and university graduates gives corporate recruiters a distinct advantage—the opportunity to pick the best.

Yet we must keep in mind the other side of the coin: namely, that some young workers entering the workforce will not have completed a postsecondary education. The challenge will be for firms to provide employment and training opportunities for people whose specific skills are limited—despite their level of formal education—but who are motivated to work.

An organization seeking to obtain a competitive advantage can do so by hiring the best employees and properly using their skills. This will require effective recruitment, retention, and training strategies to ensure that the organization is getting the most from its workforce.

**Occupational and Industry Trends**

Occupational and industry forecasts project that there will be a steady need for more people in business-related services such as computer services, retail trade, health care services, transportation, and banking and financial services well into the 21st century. Figure 1-7 lists the results of a 2003 Scotiabank study that identified the occupational sectors that are expected to display the highest growth through 2007.

All indications for the next 10 years are that the opportunities for those with managerial skills will greatly increase. There will be an acute need for skilled and experienced people with technology backgrounds to manage products, relationships, or people. Unfortunately, low-paying jobs will also be on the rise. Many new service workers—cashiering at the campus bookstore, washing dishes at a local restaurant, or providing homemaking services—are expected to be needed by 2005. The difference is that many entry-level positions in the service sector are low-paying jobs, averaging less than $10 per hour.

**FIGURE 1-7** Canada's top employment prospects through 2007.

- Biotechnology
- Business Services
- Construction
- Consulting
- Consumer Services
- Education
- Energy-related fields
- Engineering
- Environment
- Financial Planning
- Health Care
- Information Technology
- Leisure and Recreation
- Multimedia
- Skilled Trades

Some of Canada’s large, high-profile corporations have eliminated thousands of jobs. One example of these reductions are the changes at Bombardier. In the period 2001–02, Bombardier announced a layoff of more than 3,800 workers in the aerospace group with the possibility of more to come.

While the popular press focuses on “Big Business,” small businesses and mid-sized firms are expected to create most of the job growth in the foreseeable future. In 2001, small and medium-sized enterprises accounted for 77 percent of total employment. It is suggested that the biggest growth in management positions (and jobs in general) will be in smaller, rapidly growing organizations, especially technology companies. We believe that a strong small business provides a unique employment opportunity for the new graduate. Supervisors in small firms may be given the opportunity to gain broader and more diverse experience than those in larger firms.

Changing Technology and Business Conditions

Many business organizations have been completely revamped because of technological advances, computers, robotics, automation, changing markets, and other competitive influences that demand both internal and external adaptations.

Computer skills are a must for those seeking careers in management. Computers now give managers access to a tremendous amount of information—information that is necessary for making effective decisions. Information technology allows people to be no more than a few seconds away from anybody else in communication terms. This alters the traditional mode of face-to-face communication and the way things are done. The Computer Revolution will continue to be apparent throughout most organizations. Most supervisors have high-powered notebook-style computers and personal data assistants that allow them to access information and communicate virtually around the clock. Advances in hardware, software, and communication technology require supervisors to be computer literate as part of their day-to-day responsibilities.

A major problem that is likely to worsen is that of too much information. With the growth of communication capabilities, including e-mail, voice mail, instant messaging, and telephone and other devices, supervisors are being inundated by an estimated 200 or more messages sent and received every day. Many individuals have difficulty with the extra work generated by these messages, many of which waste time. The ability to properly manage information will be another of the many demanding responsibilities of supervisors both now and in the future.13

Since it is difficult to forecast specifically when and how technological change will affect a supervisor’s position, every supervisor will have to continue to be broadly educated. Supervisors will have to prepare themselves and their employees, both technologically and psychologically, for anticipated changes. Those who keep up to date with change will unquestionably be more valuable to their organizations.

Global Challenges

Global challenges will continue to affect supervisors. Substantial investment has been made in Canadian firms by Americans, British, Germans, Swiss, Japanese, and others. Identifying the various cultural, value system, and work ethic differences is beyond the scope of this text. However, supervisors must recognize that
management practices differ culturally and structurally in these firms compared with Canadian-owned and -operated firms. Within Canada, we even find significant cultural differences between the francophone and anglophone populations.

Low wages and other factors that provide a competitive advantage may entice Canadian firms to move their production facilities to locations such as Asia, Eastern Europe, Korea, South America, Africa, or Mexico. To be successful in foreign countries, Canadian firms must make a strong effort to understand the cultural customs in these environments. Over half of the world’s population lives in Asia and a majority of that population is under the age of 25, which is dramatically different from the rest of the world.

To understand the potential of global competition, consider the case of General Motors (GM). GM has become Mexico’s largest private employer with 75,000 employees. In Juarez, GM provides on-site education and volleyball courts, organizes Mother’s Day parties, and sponsors a Mexican folk-dance troupe. The employees are provided free transportation and two meals a day. In return, management has been able to run the plants almost exactly as it wishes, with virtually no work rules. On the other hand, the impact of GM’s relocation can be seen through the thousands of people unemployed, and vacant lots and buildings, in its previous locations in the United States and Canada.14

Work Scheduling and Employment Conditions

General working conditions are changing and will continue to evolve. Historically, approximately 60 percent of employed Canadians worked the traditional Monday through Friday workweek. In the future, fewer employees will be working the standard nine-to-five day because of the projected growth in jobs with evening, night, and weekend shifts.

Restructured companies will employ more part-time employees. The new contingent worker represents a quarter of the total employment base. Contingent workers are either temporary, part-time, or contract employees. This “interim” workforce consists of people who can be called in or sent home depending on the employer’s needs. For a fee, agencies supply qualified employees to the firm. The firm does not incur recruiting costs, training costs, or other costs associated with long-term employment. But the per-hour cost of contract labour is usually higher than that of regular employees, largely due to the percentage paid to the employment agency. When a project is finished or business necessity dictates (e.g., orders decline), the contract employees leave.15 More employers will expand the use of such workers in the future in their efforts to reduce wage and benefit costs associated with full-time employees. How will the supervisor motivate employees who consider themselves, at best, transient—that is, just working at the present firm until something better comes along? Numerous studies have indicated that lower productivity and increased accidents occur when employees are not fully committed to their jobs. Motivating employees who are not fully committed will be another supervisory challenge.

Another thorny issue is that of the two-tier wage system, which is a company policy to pay inexperienced workers a lower wage than more experienced workers. An example of a two-tiered wage system is at the Detroit/Windsor Tunnel Corporation where new hires are paid a lower wage and never obtain more than 75 percent of current wage levels. In some situations, the supervisor will be challenged to motivate a workforce that includes employees who are compensated differently for doing essentially the same work.
Corporate Culture and Ethical Conduct

Although top-level management creates the overall vision and philosophy for the firm, **corporate culture** is the set of shared purposes, values, and beliefs that employees hold about their organization. To provide a foundation for the type of corporate culture that is desired, many companies develop mission statements and ethical-conduct statements.

For example, when Hewlett-Packard was formed, David Packard and William R. Hewlett formulated a vision that was later stated in the Hewlett-Packard (HP) Statement of Corporate Objectives:

> The achievements of an organization are the result of the combined efforts of each individual in the organization working toward common objectives. These objectives should be realistic, should be clearly understood by everyone in the organization, and should reflect the organization’s basic character and personality.\(^{16}\)

Bill Hewlett frequently described the “HP Way” as follows: “I feel that in general terms it is the policies and actions that flow from the belief that men and women want to do a good job, a creative job, and that if they are provided the proper environment they will do so.”\(^{17}\) This philosophy has been prominently communicated to every employee and as such has become a way of life at Hewlett-Packard. Today, Hewlett-Packard is headed by Chairman and Chief Executive Officer Carly S. Fiorina, who led the company through a highly publicized 2002 merger with Compaq Computer Corporation. The challenge for the “new HP” will be to ensure that the strong corporate culture that contributed to its earlier success can survive in the new corporate structure. Figure 1-8 further describes the strong corporate culture at Hewlett-Packard.

Figure 1-9 is an example of a values and beliefs statement that was developed by the top management of the hospital described in Case 1-1 at the end of this chapter. As a new emergency room department supervisor in that case, Charlotte Kelly can use this type of values and beliefs statement as a reference point for many of the decisions that will confront her. Supervisors are major influencers in determining the direction of the corporate culture in their departments. Supervisors play a significant role in informing, educating, and setting examples for ethical behaviour. Although ethical behaviour and fair dealing have always been foundations for good management, it is clear that ethical conduct has become one of the most challenging issues confronting businesses today. The news is filled with stories about the misuse of business power and the contention that corrupt business practices are the primary way to earn profits. In the future, as never before, it will be important that ethical behaviour and fair dealing are at the forefront of good management practices, beginning at the supervisory level. A supervisor’s personal ethics are also an important guide for making decisions when facing ethical problems in the workplace.

Other Governmental and Societal Issues

Other emerging governmental and societal issues will continue to complicate the supervisory management position in the future. For example, numerous environmental concerns remain as serious long-term problems for business, government, and the general public. Energy availability and costs may be determined by international and domestic political and economic changes. These types of issues and societal pressures often become part of business planning and operations.
Stanford University classmates Bill Hewlett and Dave Packard founded HP in 1939. The company’s first product, built in a Palo Alto, California, garage, was an audio oscillator—an electronic test instrument used by sound engineers. One of HP’s first customers was Walt Disney Studios, which purchased eight oscillators to develop and test an innovative sound system for the movie Fantasia.

Hewlett-Packard’s vigour comes in part from the management philosophy and values imparted over five decades by the founders. In Silicon Valley, where arrogance and braggadocio are common, HPers are generally known for being low-key, nice, earnest, and sincere. It’s considered bad form at HP to trumpet one’s personal achievements.

- Employees in the new HP share a passion for satisfying customers, an intense focus on teamwork, speed, and agility, and a commitment to trust and respect for all individuals.
- The typical senior manager began his or her HP career in a hands-on job.
- HP is structured into global, cross-functional teams that “own” their businesses and can react quickly to market changes. “Our profit-and-loss statement is like any other small company’s,” says Jim McDonnell, marketing manager for the network server division, which sells high-powered computers. In his slice of HP, he knows exactly what the costs are and where they come from—right down to the “tax” his division contributes for corporate overhead and HP’s research and development.
- HP managers have an enviable degree of freedom. The company keeps experimenting with ways to extend autonomy to each employee. In the customer service centre where employees answer phones and respond to customers’ questions, HP allows teams to pick their own supervisors. That gives employees a strong interest in seeing their manager succeed.
- The idea at HP is to lead by persuasion, not fiat; showing, not telling; pulling, not pushing. Integrity is key to the HP leadership style. Says Chairman and CEO Carly S. Fiorina, “I think leadership takes what I call a strong internal compass. And I use the term compass because what does a compass do? When the winds are howling, and the storms are raging, and sky is cloudy so you have nothing to navigate by, a compass tells you where true North is. And I think when a person is in a difficult situation, a lonely situation … you have to rely on that compass. Who am I? What do I believe? Do I believe we’re doing the right things for the right reasons in the right ways? And sometimes that’s all you have.”
- Hewlett-Packard learned that while its managers resent being told what to do, they are not too proud to copycat good ideas. It’s common practice to seek help from other divisions that have been conspicuously successful. “I’ve never seen someone say no if you ask for help,” says Carolyn Ticknor, an HP employee.

A list of federal legislation that affects the supervisor's job is found in the Appendix at the end of this book. In addition, provincial and local governments have laws and regulations that affect businesses. The effect of such legislation can be quite costly, and organizations may be required to change their methods of operation in order to comply.

Supervisors are influenced both directly and indirectly by such governmental requirements, and they must continue to stay abreast of any legislation that may influence their operations. Furthermore, supervisors must be sensitive to pressures exerted by special-interest groups. Consumer groups, in particular, have demanded better products and services from business, labour, and government. Environmentalists seek to influence business decisions that may have an adverse environmental impact. Some parents of young children will demand that their employers provide day-care facilities so that they can better combine their family and job responsibilities. It seems likely that numerous other permanent and temporary special-interest groups will continue to place community and political demands on firms in ways that will affect how supervisors will operate in the future.

**Workplace Incivility and Difficult People**

Typical workers spend most of their waking hours in close contact with others in the workplace. Whenever people convene in one location, eight hours a day or more and often during trying economic times, their different personalities, expectations, and needs may clash from time to time. Many students can relate to the playground bully of their childhood. In some instances, the playground bully has grown up and now works alongside us. The dilemma for many employees is, “How can you expect me to get along with that troublemaker?” Two recent studies report that “rude behaviour is on the rise in the workplace and can undermine an organization’s effectiveness.”

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**FIGURE 1-9  A sample values and belief statement.**

Every Pine Village Hospital employee is important. With mutual respect, trust, and open communication, we will work together to create an organization that consistently meets or exceeds the expectations of patients, visitors, physicians, employees, and other stakeholders.

Pine Village Hospital is dedicated to providing consistently superior services to all of our patients. We believe in fostering an environment that encourages superior service and performance.

We believe that superior service and performance result from:

- A clear understanding of goals.
- Effective communication.
- Proper application of skills, knowledge, and ability.
- Wise use of resources.
- High standards of conduct.
- A safe and aesthetically pleasing work environment.
- Shared involvement in attaining goals.
Almost everyone has been on the receiving end of a rude person’s temper. Whether crude or impolite behaviour takes place behind closed doors or out in the open, it directly affects the recipient and lowers group morale. Who are these people? In his book, *Coping with Difficult People*, Robert M. Bramson writes:

> They are the hostile customers or coworkers, the indecisive, vacillating bosses, and the overagreeable subordinates of the world who are constant headaches to work with. Although their numbers are small, their impact is large. They are responsible for absenteeism, significant losses in productivity, and lost customers or clients. They frustrate and demoralize those unlucky enough to have to work with them, and they are difficult to understand. Worst of all, they appear immune to all the usual methods of communication and persuasion designed to convince them or help them to change their ways.\(^{19}\)

Various authors have given numerous titles to identify types of difficult people. Typically, employees arrive in an organization with little or no foundation in how to handle difficult people.

**Empowerment and Employee Participation in Decision Making**

Whether or not a labour union or employee association represents employees in an organization, many employees will want more from their jobs and will demand a voice in decisions that concern their employment. This should not be objectionable to a supervisor. In fact, once supervisors realize that their employees have something to contribute, they will welcome employee participation in decisions rather than fear it.

**Empowerment** means giving employees the authority and responsibility to achieve objectives. Opportunities to make suggestions and participate in decisions affecting their jobs can and should be supported. However, some supervisors become troubled when workers challenge what have traditionally been management rights, and they believe that certain areas should be beyond employee challenge. Many quality circles and other participatory management approaches of the last decade failed, in part, because managers failed to listen to the suggestions of employees, did not act on those suggestions in a timely fashion, or felt threatened by those suggestions. Nevertheless, there will continue to be pressure from employees, labour unions, and other groups for more influence in decisions pertaining to the workplace.

Many supervisors have become accustomed to the practice of **participative management**, which essentially means a willingness to permit employees to influence or share in managerial decisions. Learning to react to this in a positive way should improve supervisors’ and their companies’ performance.\(^{20}\)

Although forecasts are always precarious, experienced supervisors will recognize that these trends have already begun. Supervisors must understand and plan for them. Empowerment and participative management will be discussed further in Chapter 6.
entry-level and other departmental employees. Every organization, whether a retail store, manufacturing firm, hospital, or government agency, has someone who fills this role.

Throughout this text we use the terms *worker, employee, and subordinate* interchangeably to refer to individuals who report to supervisors or managers. An increasing number of companies are using the term *associate or team member* instead of *employee*. Regardless of the term used, employees may view their supervisor as the management of the organization; the supervisor is their primary contact with management. Employees expect a supervisor to be technically competent and to be a good leader who can show them how to get the job done.

But the supervisor also must be a competent subordinate to higher-level managers. In this role the supervisor must be a good follower. Moreover, the supervisor is expected to maintain satisfactory relationships with supervisors in other departments. Thus, a supervisor’s relationship to other supervisors is that of a colleague who must cooperate and coordinate his or her department’s efforts with those of others in order to reach the overall goals of the organization.

In general, the position of any supervisor has two main requirements. First, the supervisor must have a good working knowledge of the jobs to be performed. Second—and more significantly—the supervisor must be able to manage, that is, run, the department. It is the managerial competence of a supervisor that usually determines the effectiveness of his or her performance.

**Managerial Skills Make the Difference**

Some supervisors appear to be under constant pressure and continuously do the same work their subordinates do. They are getting by, although they feel overburdened. These supervisors endure long hours, may be very devoted to their jobs, and are willing to do everything themselves. They want to be effective, although they seldom have enough time to actually supervise. Other supervisors appear to be on top of their jobs, and their departments function in a smooth and orderly manner. These supervisors find time to sit at their desks at least part of the day, and they are able to keep their paperwork up to date. What is the difference?

Of course, some supervisors are more capable than others, just as some mechanics are better than others. If we compare two maintenance supervisors who are equally good mechanics, have similar equipment under their care, and operate under approximately the same conditions, why might one be more effective than the other? The answer is that effective supervisors manage their departments in a manner that gets the job done through their people instead of doing the work themselves. The difference between a good supervisor and a poor one, assuming that their technical skills are similar, is the difference in their managerial skills.

The managerial aspects of the supervisor’s position too often have been neglected in the selection and development of supervisors. Typically, people are selected for supervisory positions on the basis of their technical competence, their seniority or past performance, and their willingness to work hard. When appointed supervisors, they are expected to assume responsibilities of management, even though their previous job did not involve these skills. New supervisors must make a conscious effort to develop their managerial skills by learning from their own manager, through company training programs, or by any other avenues available to them.
We have grouped the managerial skills needed by supervisors into the following six major classifications:

1. **Technical skills**: the ability to perform the actual jobs within the supervisor’s area of responsibility.
2. **Human relations skills**: the ability to work with and through people; includes the ability to motivate team members and the ability to remain open-minded.
3. **Administrative skills**: the ability to plan, organize, and coordinate the activities of a work group.
4. **Conceptual skills**: the ability to obtain, interpret, and apply the information needed to make sound decisions.
5. **Political skills**: the savvy to ascertain the hidden rules of the organizational game and to recognize the roles various people play in getting things done outside formal organizational channels.
6. **Emotional intelligence skills**: the “intelligent use of your emotions to help guide your behaviour and thinking in ways that enhance your results. You can maximize your emotional intelligence by developing good communication skills, interpersonal expertise, and mentoring abilities.”

Chess master Bruce Pandolfini stresses that there are two basic forms of intelligence: (1) the ability to read other people and (2) the ability to understand one’s self. The notion of knowing oneself is not new. Unfortunately, it was not too many years ago that people believed you could take “the best mechanics” or “the best salespeople,” give them the title of “supervisor” or “manager,” and success would automatically follow. Clearly, this is not the case. Hagberg Consulting Group’s 12-year study of over 2,500 senior managers found that 25 percent of those on the rise in high-tech companies lacked “people skills” such as the ability to motivate teams or open-mindedness. Apparently technical skills alone are not sufficient.

**The Need for Technical Competence in Supervision**

Nevertheless, a competent supervisor must thoroughly understand the specific, technical aspects of the department’s operations. Perhaps the supervisor actually is the most skilled person within the department and is able to do a quicker, more efficient job than most of the subordinates. Yet the supervisor must learn to avoid stepping in and personally doing the employees’ jobs except for the purpose of instruction or in short-handed or emergency situations. In some companies a union contract may restrict supervisors from performing employees’ work. The responsibility of a supervisor as a manager is to see that the employees do their jobs properly. As a manager, the supervisor must plan, guide, and supervise.

In some organizations supervisors are considered to be “working supervisors,” or “lead persons,” whose responsibilities include performing certain jobs within their departments. Supervisors of very small departments, for example, often are expected to perform a share of the workload assigned to their units. Similarly, supervisors in retail stores and in many service occupations typically work along with their employees to accomplish the work. Nevertheless, whenever a supervisor is occupied with a job that could be performed by an employee, the supervisor’s managerial functions necessarily are neglected.
At the other extreme, some departments are involved in varied and complex operations in which individual jobs may be quite diversified and even specialized. In these situations it would be impossible for a supervisor to comprehend the exact details of each job. However, it remains important for the supervisor to at least understand the broad technical aspects of each job under his or her supervision—and to know where to get help when needed.

Managerial Skills Can Be Learned and Developed

Many people believe that good managers, like good athletes, are born, not made. Much research has indicated that this belief is generally incorrect, even though it is true that people are born with different potential and that, to some degree, heredity does play a role in intelligence. An athlete who is not endowed with natural physical advantages is not likely to run 100 metres in record time. On the other hand, many individuals who are so-called “natural athletes” have not come close to that goal either.

Most superior athletes have developed their natural endowments into mature skills by practice, learning, effort, and experience. The same holds true for a good manager. The skills involved in managing are as learnable as the skills used in playing golf. It does take time, effort, and determination for a supervisor to develop managerial skills. Supervisors will make some mistakes, but people learn from mistakes as well as from successes. By applying the principles discussed in this text, the supervisor can develop the skills that make the supervisory job a challenging and satisfying career.

Throughout the text there are various activities designed to reinforce the concepts presented. Tips, suggestions, and cases will be available to allow you to practise the skills being presented. These tools do not guarantee supervisory success, however. For example, if you wanted to learn to play golf, you could take lessons from Butch Harmon, Tiger Woods’ teacher.24 But you would also need the proper tools (e.g., the right clubs) and time to practise, learn from your mistakes, and make corrections. There is one major difference between the beginning golfer and the newly appointed supervisor. Unlike beginning golfers, who can go to the driving range or the practice green to work on their games, newly appointed supervisors are on the job and have little opportunity for trial and error. To get the job done right, the supervisor must avoid some common mistakes. As you read this book, consider our suggestions and remember that the challenge for supervisors is to stay on the path of continuous improvement.

Benefits from Better Supervisory Management

You may recall from Figure 1-1 that there are many benefits accruing to the effective supervisor. A supervisor has daily opportunities to apply managerial principles on the job. Proper application of the principles will contribute to a smoother-functioning department in which the work gets done on time and the workers contribute toward stated objectives more willingly and enthusiastically. Thus, the supervisor will be on top of the job instead of being consumed by it. Supervisors who manage well are able to make suggestions to higher-level managers and to other supervisors. Effective supervisors become aware of the needs and objectives of other departments as well as the interrelationships between those other departments and their own. They seek to work in closer harmony with colleagues who supervise other departments. Briefly, better supervisory management means doing a more effective job with much less stress and strain.
In addition to direct benefits, there are indirect benefits to better supervisory management. The supervisor who manages well will become capable of handling larger and more complicated assignments, which could lead to more responsible and higher-paying positions within the managerial hierarchy. Managerial skills are applicable in any organization and at all managerial levels, regardless of where a supervisor’s future career may lead.

The term *management* has been defined in many ways. In general, *management* is the process of getting things accomplished with and through people by guiding and motivating their efforts toward common objectives.

Successful managers will assure you that their employees are their most important asset. Most successful managers recognize that they are only as good as the people they supervise. As illustrated in Figure 1-10, the supervisor should act as an *enabler*—someone who does what is necessary to enable employees to be the best they can be. In most endeavours, one person can accomplish relatively little. Therefore, individuals join forces with others to attain mutual goals. In a business, top-level managers are responsible for achieving the goals of the organization, but this requires the efforts of all subordinate managers and employees. Those who hold supervisory positions significantly influence the effectiveness with which people work together and use available resources to attain stated goals. The role of a supervisor is to make sure that assigned tasks are accomplished with and through the help of employees. Figure 1-11 provides some supervisory tips that can assist the supervisor in fulfilling this role.

The manageral functions of a supervisory position are similar, whether they involve supervision of a production line, sales force, laboratory, or small office. Moreover, the primary managerial functions are the same regardless of the level within the hierarchy of management. It does not matter whether one is a first-level supervisor, a middle-level manager, or part of top-level management. Managerial functions are the same whether the supervisor is working in a profit-making firm, a nonprofit organization, or a government office. Supervisors, as well as other managers, perform the same basic managerial functions in all organizations. In this textbook we classify these functions under the major categories of planning, organizing, staffing, leading, and controlling. The following description of these functions is general and brief since most of the book is devoted to discussing their application—particularly at the supervisory level.

**Planning**

The initial managerial function—determining what should be done in the future—is called *planning*. It consists of setting goals, objectives, policies, procedures, and other plans needed to achieve the purposes of the organization. In planning, the manager chooses a course of action from various alternative courses that are available. Planning is primarily conceptual in nature. It means thinking before acting, looking ahead and preparing for the future, laying out in advance the road to be followed, and thinking about what and how the job should be done. It includes collecting and sorting information from numerous...
sources and using it to make decisions. Not only does planning include deciding what, how, when, and by whom work is to be done, but also the development of “what if” scenarios.

Many supervisors find that they are constantly confronted with one crisis after another. The probable reason for this is that they neglect to plan; they do not look much beyond the day’s events. It is every supervisor’s responsibility to plan, and this cannot be delegated to someone else. Certain specialists, such as a budget officer, a production scheduler, or an engineer, may provide the supervisor with assistance in planning. But it is up to each supervisor, as the manager of a department, to make specific departmental plans that coincide with the general objectives established by higher-level management.

Planning is the managerial function that comes first, and, as the supervisor proceeds with other managerial functions, planning continues. Previous plans are revised and different alternatives are chosen as the need arises. This is particularly true as a supervisor evaluates the results of previous plans and adjusts future plans accordingly.
Once plans have been made, the organizing function primarily answers the question, “How will the work be divided and accomplished?” This means that the supervisor defines the various job duties and groups these activities into distinct areas, sections, units, or teams. The supervisor must specify the duties required, assign them, and, at the same time, provide subordinates with the authority needed to carry out their tasks. Organizing means arranging and distributing work among members of the work group to accomplish the organization’s goals.

**Staffing**

The managerial tasks of recruiting, selecting, orienting, and training employees are grouped within the function called staffing. This function includes appraising the performance of employees, promoting employees where appropriate, and providing them with further opportunities for development. In addition, staffing includes devising an equitable compensation system and rates of pay. Some activities involved in the staffing function are handled by the human resources (or personnel) department in many companies. For example, the human resources department and top-level managers establish the compensation system. Supervisors generally do not perform this task. However, day-to-day responsibility for essential aspects of the staffing function remains with the supervisor.

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**FIGURE 1-11 Supervisory tips—The E-Z route for supervisory success.**

- Above all, supervisors should do all of the things necessary to enable employees to be the best they can be at their assigned tasks.
- Supervisors must foster and sustain a commitment to excellence.
- Employees need to know what is expected in the way of performance.
- Supervisors should establish common goals and purpose.
- Employees must be educated, that is, acquire the requisite job skills through coaching and/or training.
- Employees must be equipped, that is, have the necessary tools, supplies, and equipment to do the job.
- Employees need to be encouraged to see things that need to be done and do them.
- Employees should be empowered so that they have the authority and responsibility to achieve objectives.
- Supervisors should nurture an exciting workplace where employees can find meaning and fulfillment of their individual needs.
- Employees should experience a variety of tasks and thus become experienced in many areas that use a variety of skills.
- Supervisors should engage their employees in two-way communication so that understanding takes place.
- Supervisors should keep their emotions under control.
- Supervisors should possess empathy, that is, understand their employees’ feelings, needs, and concerns.
- Supervisors should enthusiastically exalt employees when the job is well done.
Leading means guiding employees toward accomplishing objectives. It is the day-to-day process around which all supervisory performance revolves.

**Leading**

**Leading** means guiding the activities of employees toward accomplishing objectives. The leading function of management involves guiding, teaching, and supervising subordinates. This includes developing the abilities of employees to their maximum potential by directing and coaching them effectively. It is not sufficient for a supervisor just to plan, organize, and have enough employees available. The supervisor must attempt to motivate employees as they go about their work. Leading is the day-to-day process around which all supervisory performance revolves. Leading is also known as directing, motivating, or influencing since it plays a major role in employee morale, job satisfaction, productivity, and communication. It is through this function that the supervisor seeks to create a climate that is conducive to employee satisfaction and at the same time achieves the objectives of the department. Finding ways to satisfy the needs of a diverse employee workforce is a significant challenge. In fact, probably most of a supervisor’s time is spent on this function since it is the function around which departmental performance revolves.
Controlling

The managerial function of **controlling** involves ensuring that actual performance is in line with intended performance and taking corrective action as necessary. Here, too, the importance of planning as the first function of management should be obvious. It would not be possible for a supervisor to determine whether work was proceeding properly if there were no plans against which to check. If plans or standards are superficial or poorly conceived, the controlling function is limited. Thus, controlling means not only making sure that objectives are achieved, but also taking corrective action in case of failure to achieve planned objectives. It also means revising plans if circumstances require it.

**The Continuous Flow of Managerial Functions**

The five managerial functions can be viewed as a circular, continuous process. In Figure 1-12 we can see that the functions flow into each other and that each affects the performance of the others. At times there is no clear line to mark where one function ends and the other begins. Also, it is not possible for a supervisor to set aside a certain amount of time for one or another function since the effort spent in each function will vary as conditions and circumstances change. But there is no doubt that planning must come first. Without plans, the supervisor cannot organize, staff, lead, or control.

**Managerial Functions Relative to Time and Position**

The time and effort devoted to each of the managerial functions will usually vary depending on a person’s level within the management hierarchy. Many studies have reported that top-level executives spend most of their time planning and controlling and less time organizing, staffing, and leading. Typically, supervisors spend more time leading and controlling and less time planning, organizing, and staffing (see Figure 1-13).
For example, first-line supervisors’ plans will be more limited in span and magnitude than those of high-level managers. A top executive may plan to buy equipment involving millions of dollars and affecting the entire organization, perhaps for years to come. By comparison, the supervisor typically plans for using employees, equipment, and material for shorter periods of time involving restricted amounts of money and other resources. The top executive usually depends upon subordinate managers to carry out the organization’s activities and thus spends a minimum of time in direct supervision. The first-line supervisor, however, is concerned with getting the job done each day and has to spend considerable time directing and leading the efforts of employees.

To summarize: all managers perform essentially the same managerial functions, regardless of the nature of the organization or their level in the hierarchy. The time and effort involved in each of these functions will vary depending on the rung of the management ladder the manager occupies. Of course, at times this may also depend on the scope and urgency of the situation at hand.
Every chapter in this text ends with a section called “What Call Did You Make?” This section refers back to the case problem posed in the section titled “You Make the Call” that appears at the beginning of each chapter. In this and other concluding sections, we will provide our analysis and recommendations, which you should first compare with your own before considering and discussing relevant areas of agreement and differences.

As Leslie McGuire, you are in the enviable position of having a job opportunity appear somewhat “out of the blue.” Because you have been working part-time at Brant Coatings Ltd., you have some background information about the organization and its people. However, you need more information about the potential job opportunity and would be well advised to meet with the plant manager tomorrow to learn more.

Before your meeting, you should clarify your short- and longer-term career and personal goals. Many people simply “fall into” a job and are then surprised to find that it doesn’t suit them. You do not seem to have formulated any specific career goals and your job search appears to have been unfocused. What kind of position are you looking for? What do you enjoy doing, and what strengths do you have? By engaging in a bit of self-analysis, you will be better able to decide whether the job at Brant Coatings is a good match for you.

Next, you need to clarify whether you are interested in supervisory management. Figure 1-1 described some of the “pluses” and “minuses” of the supervisory role. How do you feel about the rewards and stresses that you may encounter? Are you up for the challenge? Some people are excited about the possibility of leading a work group. Others would prefer to work independently and not be responsible for leading a team. Which statement best describes you? You seem to have a good rapport with your supervisor, Colleen Grenier. You may want to meet with Grenier or any other supervisors you may know to discuss their experiences in supervision and to learn more about what you could expect in this role.

Making the transition to supervisor can be particularly challenging when one is promoted from the front lines of the organization. It is particularly difficult to become the supervisor of people who were formerly your coworkers. This may or may not be an issue at Brant Coatings. The plant manager wants to talk to you about supervising on the night shift, and these would be employees that you have likely not worked closely with in the past. You will, however, be scrutinized closely by people who see you as the “new kid.” There are likely some experienced production workers who may also be interested in the supervisory job. If you are promoted, you will need to ensure that you engage in some team building early in your mandate to ensure that these people are brought on side. If some of the front-line workers are “very set in their ways” you will have to be careful about how you go about implementing change, especially in the early days. Participatory management styles will be discussed later in the text. You may want to review strategies for ensuring that any changes you implement are fully supported by your team.

In addition to clarifying your career goals, you should also draft a list of specific questions that you would like to ask the plant manager. For example, you may want to know more about the specific areas of responsibility you would have, how much latitude you would have in implementing production efficiencies, and so on. Think about the specific information you need, and write your questions down.

The job of night shift supervisor may be an excellent way to gain some managerial experience. It was pointed out in this chapter’s Contemporary Issue box that people generally do not expect “jobs for life” in the same organization. It is useful to realize that the skills that you can learn in supervisory management will certainly be transferable to other positions in other industries. If your goal is to own your own business some day, it is likely that you would have people working for you and supervisory skills would certainly be useful. Think about your longer-term career goals and decide how well this position is aligned with those goals.

You have an exciting job prospect in front of you. Engage in some self-analysis and gather as much information as you can to determine whether the job is a good match for you at this stage in your career.
Supervisors are the first tier of management. They manage entry-level and other departmental employees. New ways of managing employees will be the supervisor’s challenge. In a rapidly changing business environment, the success of the supervisor will rest in his or her ability to balance the requirements for high work performance with the diverse needs of the workforce.

Supervisory management focuses primarily on the management of people. For many people, being a supervisor provides a variety of satisfying experiences. However, what one person sees as an opportunity and a reason for accepting the supervisory challenge, others may see as a negative. Among these are the challenge of getting diverse people to work together, the increased responsibility that comes with climbing the management hierarchy, and the unpredictable nature of the job. Being a supervisor is a demanding position that often places the supervisor in the middle of organizational pressures and conflict. A supervisor must endeavour to reconcile the needs of the organization with the needs of employees, which is often an elusive goal.

In addition, major environmental factors affect everything the organization does. These factors are not static; the whole world is changing rapidly, and some people do not want to deal with change.

Many factors and trends in the workforce will have an impact on how most organizations operate. The workforce will grow at a somewhat faster rate than the overall population, and the age composition of the workforce will change. Women and minorities will continue to enter the workforce in increasing numbers, and they will be utilized more fully than in the past, including further advancement in supervisory and management positions. Substantial numbers of part-time employees and contract employees will be in the workplace. The more diverse workforce will create numerous challenges (e.g., multicultural and multilingual differences, family obligations versus job obligations). The workforce generally will consist of more college and university graduates, but many other people will not be prepared educationally to qualify for available employment opportunities.

Occupational and industry trends, changing technology and business conditions, and the competition from the global marketplace will be significant influences on supervisory management. Government laws and regulations will continue to have a major impact on the policies and activities of most organizations.

Because of increased incivility and even workplace violence, more firms will establish programs and procedures to help supervisors recognize the symptoms of problem employees.

Supervisors will have to be sensitive to existing and expected employee trends. For example, more employees than ever before will expect their jobs to have greater personal meaning to them as individuals. It is likely that supervisors will have to be somewhat flexible in their approaches to managing. Employees will continue to expect a greater voice in workplace decision making and to be empowered.
Supervisors are the “people in the middle.” Employees see their supervisors as being management, but supervisors are subordinates to their own managers at higher levels. To supervisors of other departments, they are colleagues who must be able to work collaboratively. Supervisors must have good working knowledge of the jobs being performed in their department and the ability to manage.

The effective supervisor needs to possess administrative, conceptual, human relations, technical, and political skills. The supervisor must understand the technical aspects of the work being performed. When attempting to manage job performance, understanding employee needs is essential. “People skills” help the supervisor accomplish objectives with and through people. It is equally important for the supervisor to possess an understanding of the dynamics of the organization and to recognize organizational politics.

The skills are important to all levels of management. Most supervisors come to the job equipped with at least some of these skills. Supervisors have daily opportunities to apply managerial skills and must continually strive to develop those skills. Effective application of the skills will contribute to the accomplishment of organizational objectives and will allow the supervisor to stay on top of the job. Supervisors who effectively apply these skills will be able to contribute suggestions to higher-level managers and will be able to work in harmony with their colleagues. In short, the skilled supervisor will be a candidate for advancement and additional job responsibilities.

While there are numerous definitions of management, we have defined management as the process of getting things accomplished through people by guiding and motivating their efforts toward common objectives. Supervisors should look at themselves as enablers, that is, as clarifying expectations for employees and giving employees the right tools, training, and opportunities to succeed. In short, supervisors should do all those things that enable their employees to be the best they can be—while achieving organizational objectives.

The five major managerial functions are planning, organizing, staffing, leading, and controlling. The functions are viewed as a continuous flow—that is, the functions flow into each other, and each affects the performance of the others.

Planning is the first function of management, and the performance of all other managerial functions depends on it. The five managerial functions are universal, regardless of the job environment, the activity involved, or a person’s position in the management hierarchy. Typically, supervisors spend most of their time leading and controlling. A supervisor’s planning will cover a much shorter time and narrower focus than that of a top-level executive.

**QUESTIONS FOR DISCUSSION**

1. What are some of the advantages of being a supervisor? What are some of the disadvantages?
2. Of those factors or trends projected to reshape the workplace, which will create the greatest challenge for supervisors? Why do you think so?
3. What adjustments will you have to make in order to effectively lead a diverse group of people?
4. Based upon your experience, do you agree that employees want more from their jobs and demand a voice in decisions that concern their employment? Discuss specific examples from your own experience that either support or refute this statement.
5. Define participative management. What advantages can be gained by a supervisor who practises participative management techniques? Are there any potential disadvantages to this style of management?
6. Is it necessary that a supervisor be able to perform all of the job functions in his or her department? Discuss.
7. Define “corporate culture.” Is it possible for a supervisor to create a “departmental culture” in his or her own area that is distinct from the prevailing corporate culture? Is this advisable? Explain.
8. Identify the major managerial skills needed by every supervisor. Why are these important? Are emotional skills more or less important than the other skills? Explain.
9. How would you respond to someone who says, “I really get along well with everyone. I think I would be a good supervisor”?
10. We suggest that supervisors should view themselves as enablers. This suggests that the supervisor should clarify the objectives that must be attained, provide the training and tools needed to complete the task, and get out of the way. Should “management by getting out of the way” be an appropriate philosophy of management? Why or why not?

**SKILLS APPLICATIONS**

**Skills Application 1-1: Creating Your Own Supervisory Credo**

Most students have employment experience and have been supervised by one or more people in their past. Think back to the supervisors you have worked for. How effectively did these people carry out their supervisory responsibilities?

a. Thinking about these supervisors from your past, create two lists—one identifying the things you will definitely not do as a supervisor, and one identifying the behaviours and practices you will want to exhibit as an effective supervisor.

b. There is a risk that when you are in a supervisory position you will drift away from your “Will Do” list from above. Some supervisors find that, in the face of the day-to-day pressures of the job, they sometimes lose the vision of the type of supervisor they want to be. One way to avoid losing your focus is to write your own supervisory credo—a personal statement of your own supervisory values and beliefs that can be referred to whenever you feel you are not living up to your own expectations. Using the Internet, research the topic of management credos, then, referring to your list from part (a) above, draft your own supervisory credo.

**Skills Application 1-2: Understanding the Workforce Profile in Your Community**

Statistics Canada is a federal government agency that compiles and publishes a wide range of useful statistics about many aspects of Canadian life.

a. Go the Statistics Canada website at www.statcan.ca, and familiarize yourself with the information that is available there, including “The Daily” and the “Canadian Statistics” tabs.

b. From the www.statcan.ca homepage, click on the “Community Profile” tab, and type the name of your city or town to access specific census information for your community. You will be provided with a wealth of information about the demographic makeup of your geographic area. Analyze the information about labour force participation rates, age profiles, and ethnic diversity in your community. How does your community profile compare to the demographic trends discussed in this chapter? What are the specific areas of similarity or difference?
Skills Application 1-3: Classifying Supervisory Activities

In this chapter, you were introduced to the managerial functions of planning, organizing, staffing, leading, and controlling. Below are some common supervisory activities. For each activity, indicate the primary managerial function:

a. Reviewing last week’s staff productivity reports.
b. Conducting an interview for a vacant position.
c. Meeting with staff to discuss their ideas for solving a quality assurance problem.
d. Completing the final draft of your department’s budget for next quarter.
e. Meeting with a supervisor from another department to discuss a problem of work duplication between your two departments.
f. Conducting a performance review meeting with one of your employees.

CASES

Pine Village Hospital (PVH) is one of four hospitals in a metropolitan area of more than 400,000 people (see Figure 1-9 for PVH’s values and belief statement). Upon graduating from nursing school some 30 years ago, Charlotte Kelly began as a cardiac-care nurse in Hope, British Columbia. There she met her husband and began a family. Kelly was a full-time mother while her two children were going through school. Shortly after her youngest child graduated from high school, Kelly’s husband was killed in an automobile accident. She moved to Pine Village to be near her sister and because PVH was looking for someone to be the admitting department’s evening shift team leader. As a shift team leader, Kelly had limited authority and was not considered to be part of PVH’s management team. The hours were not convenient, but it was the best job opportunity available. Pat Rekus, the admitting department supervisor, was encouraging and supportive.

Even with the difficult work schedule, Kelly was able to take some distance learning courses that enabled her to receive a certificate in medical records technology and to pursue a diploma in supervision and organizational leadership. She also found time to attend a series of noncredit leadership courses at the local college. The classes were taught by experienced instructors with relevant work experience. Her favourite instructor was Agnello Monetti, a middle-aged supervisor at a local company who incorporated many anecdotes into his classes. Monetti usually started each class with a current problem or an issue that required students to interact and expand on their supervisory perspectives. Kelly enjoyed this “team” or “collaborative” approach to learning, because her fellow classmates brought a variety of experiences to the class, and learned from one another.

One afternoon, Rekus summoned Kelly to her office. To Kelly’s surprise, Bob Murphy, vice president of administration, was also present. Murphy began the conversation. “Charlotte, we are very pleased with the job you’ve done as the team leader on the evening shift. You are an excellent role model and a good listener. You have a reputation as someone who expects the best from people and does the things necessary to enable them to be the best they can be. Effective Monday morning, we want you to become the Emergency Department supervisor. You’ve earned a promotion to management. While this is a big step, we know that you will be able to handle this assignment, even though you haven’t worked in the Emergency Department before. This position reports to me, and
I’ll be available to help you if any problems arise.” Rekus added, “Charlotte, you’ve done such a good job of cross-training your people and delegating, we’d like you to recommend your replacement.”

When Kelly returned to her department, she was both exhilarated and a bit sobered by this offer. “Wow,” she thought to herself. “This will be hard. Pat Rekus has been a great mentor. I learned a lot from her, but I wonder if I’ve got the right stuff to be in a supervisory management position. Do I really want all the headaches, responsibilities, and pressures that the Emergency Department supervisor has to deal with? Come to think of it, they never gave me a chance to turn it down.”

On her way home, Kelly reflected on what lay before her. She had learned that Amy Talmadge had been fired as Emergency Department supervisor. The Emergency Department had become the subject of many employee jokes, and turnover was extremely high. Kelly had heard that Talmadge had the reputation of being an autocratic, demanding, and insensitive person. She had expected her employees to do as she demanded, and at times she was known to have criticized and embarrassed people in public. The Emergency Department consisted of a very diverse group of employees, which apparently had contributed to Talmadge’s inability to get them to work together. Kelly thought to herself as she pulled into her garage, “I know some things not to do, but I’m not certain that I can make the transition from team leader to supervisor.”

Questions for Discussion

1. What are the greatest difficulties Kelly faces as she begins the new job?
2. List Kelly’s strengths and weaknesses related to making this transition.
3. If you were Kelly, what would you do to prepare for Monday’s new assignment?
4. How might Bob Murphy and Pat Rekus go about ensuring that Kelly succeeds in her new position?
5. Internet Activity: Find three or four programs or strategies that Kelly could implement to reduce the high turnover.

CASE 1-2

The Socializing Supervisor

Indra Shahir was promoted to a supervisory position in the Metro Insurance Company’s Operations Division. She was chosen for the position by the manager of operations, Ronnie Callahan, who felt Shahir was the ideal candidate for the position. Shahir had been hired five years earlier as a general-purpose employee. Metro cross-trained all new employees so they were capable in a variety of functions. Two other employees had been in the division for at least 10 years, but they had consistently expressed their dislike for any leadership responsibilities. In addition, Shahir’s job performance ratings were very good, her attendance was near perfect, and she seemed to be well liked by her colleagues and others who knew her well.

When Callahan told Shahir that she was to become supervisor of the accident claims department, she asked him how she should handle the problem that her fellow employees now would be her subordinates. Callahan told her not to be concerned about this and that her former associates would soon accept the tran-
sition. Callahan also told Shahir that the company would send her to a supervisory management training program sponsored by a local college as soon as time became available.

After several months, however, Callahan was getting the impression that Shahir was not making the adjustment to her new position. Callahan was particularly concerned that he had observed Shahir socializing with her employees during lunch breaks, coffee breaks, and the like. Callahan had received reports that Shahir often socialized with several of her employees after work, including going to bars and to parties arranged by these employees.

Furthermore, Callahan had received a number of reports from managers and team leaders of other departments that the work performed by the accident claims department was not being performed as it should be. Several managers in the company told Callahan that the department employees spent too much time away from their work on longer than normal breaks and lunch periods. One manager told Callahan, “Since Indra became supervisor, there is little discipline in the department, and it’s just a big social group that reluctantly does a little work.”

After reviewing various productivity reports, Callahan realized that Shahir had not made a good adjustment to supervising employees in her department. He wondered how much of this was attributable to her lack of experience as a supervisor and worried that her former colleagues might be taking advantage of her. At the same time, Callahan was concerned that Shahir perhaps did not have the desire to disassociate herself from socializing and being a “buddy” to her employees. Callahan wondered what his next step should be.

**QUESTIONS FOR DISCUSSION**

1. Evaluate the decision to promote Indra Shahir to supervisor. Discuss the problems associated with promoting anyone to team leader or supervisor over his or her former fellow employees.
2. Besides sending Shahir to a supervisory training program, what other actions could Callahan and Shahir have taken to prepare Shahir for the transition to the supervisory role?
3. Why is it dangerous for a supervisor to socialize with direct-report employees? Why does this leave a team leader or supervisor open to criticism, as exemplified in this case?

**APPENDIX: GETTING INTO SUPERVISION**

Job hunting is not usually easy. For some people, opportunities appear when they least expect them. For others, the road appears to be steep. Many individuals get their first supervisory positions from nonsupervisory jobs in the same organization. It may be in the same department, or in another area. They may have formally applied for the position or, like Leslie McGuire in the “You Make the Call” feature, had a manager recommend them.

If you are employed while going to school, it can be tough to find the time to do an effective job search for a position outside your current firm. In addition, you will have the added burden of being discreet—many employers take a dim view of employees who are seeking employment elsewhere; their loyalty and commitment are questioned. Do not make or receive job search–related calls at work. Advise prospective employers to contact you at
home or through the campus placement office. Schedule interviews before or after work, or on your days off. Most importantly, do not leave your job until you have a new one.

A former student told one of the authors that she had sent her résumé to a blind advertisement—neither the firm nor its address was listed. Her immediate supervisor informed her that he had received her résumé and was wondering why she was unhappy with her current position. She had applied for a job similar to the one she currently had, but the advertisement listed broader responsibilities and sounded challenging. She was at a loss for words. She later left the organization, not for a better job but because she felt the supervisor never gave her a chance after that.

Where to Look for Information

As a student, you have access to a variety of sources of information to assist in a job search. Attend on-campus career fairs. Contact your professors, and ask for their advice and information about their industry contacts. Visit your college or university career centre for government publications, industry data, and specific information about potential employers in your area.

Many students find that networking is a useful strategy. A recent study found that employee referrals were the single largest source—30 percent to 40 percent—of new hires. That is at least double the number of people hired through job listings. Meet and talk with personal and professional colleagues and friends to help you identify potential opportunities. Talk to people you know through school, family, or other activities to gather information and referrals. “I’m finishing my diploma in April and am looking for career opportunities,” you might say. “Your company has a reputation of being a good place to work. Do you know of any opportunities there?” Such an approach could be a good networking start. A visit to the library or the Internet will turn up lots of information about an organization, such as annual reports, trade magazines, and newspaper articles. This information will give you a good picture of the company’s financial position, management style, and future prospects. Increasingly, employers are listing jobs online and describe their products and services on websites. Figure 1-14 contains a partial list of online services. You can submit your resume to databases that employers consult for candidates. But remember, an online search should be only one of your many job search strategies.

Make Yourself More Valuable

In general, we believe that the best way to get a supervisory position is to find ways to make yourself more valuable. Always try to improve yourself. For example, if you are a student, make yourself available for internships and co-ops, or perhaps volunteer for some type of meaningful activity. Volunteer experiences in community groups can give you ideas and practical experiences and can help you become more comfortable working with and leading groups of diverse people. Get involved in one or more student organizations on your campus. The benefits of applying your expertise and using opportunities to enhance your communication and leadership skills are invaluable.

Remember, too, that continuing your educational preparation is an ongoing challenge. Finishing an academic degree or diploma is only a start; consider going further by enrolling in further credit and noncredit programs that may enhance your technical, managerial, or supervisory knowledge. Increasingly, colleges and universities are offering online programs that can be taken at home via computer.

Finally, evaluate your SKAs and your past experience. When applying for any position and particularly for a supervisory one, you must discover the specific needs of the hiring organization and show how your SKAs can add value to the firm. The message? Be assertive enough, bold enough, and knock on enough doors (see Figure 1-15) and you will ultimately be successful.
Canada WorkInfoNet at www.workinfonet.ca is a national, provincial, and territorial partnership that provides access to over 2,000 Canadian websites. It describes its mandate as “helping Canadians connect to the resources they need in the areas of jobs, work and recruiting; learning, education and training; occupations and careers; labour market information and outlook; self-employment; workplace issues and supports; and financial help and issues.” This collaborative venture developed by public, private, and not-for-profit sectors is a great place to start. There are valuable links to provincial and territorial partner sites.

Globecareers.com, combined with Workopolis, calls itself “Canada’s biggest job site.” This Canada-only database provides more than 7,000 available jobs and has a Career Alert feature that will e-mail listings to you that match your profile.

Human Resources and Skills Development Canada at www.hrsdc-drhc.gc.ca provides a variety of resources such as career counselling information and a national job bank. Its most unique feature is the Electronic Labour Exchange. A database of available jobs is compared to the candidate’s skill profile. With a match, the profile is forwarded to the potential employer.

CACEE WorkWeb at www.cacee.com is dedicated to helping students and recent graduates find meaningful employment. Its WorkWeb (created by the Canadian Association of Career Educators and Employers) provides job-search advice, links to employers, and access to government and professional home pages. It even includes information about the rights of the job seeker.

Monster Board offers access to information on more than 50,000 jobs worldwide. It will find job listings that match your profile and e-mail them to you once a week. Although most of its jobs are aimed at experienced candidates, it also has plenty of entry-level positions. Its much smaller Canadian site at www.monster.ca offers the same features.

1. Look for a job in the right places.
   • Networks.
   • Bulletin boards or websites.
   • Newspaper classifieds.
   • Job fairs.
   • Recruiting firms.
   • Temporary agencies.
   • Individual employers.

2. Think like an employer.
   • Ask yourself the following question: “If I were the one hiring for a position, what would I want to see in a résumé?”
   • Who are you?
   • What do you know?
   • What have you done?
   • What have you accomplished?
   • Who can give you a good recommendation?

3. Prepare for the interview.
   • Research the company.
   • Find the gatekeepers, those people who may be in touch with those doing the hiring.

4. Be proactive.
   • Ask questions about the job or the company (e.g., which qualifications are most important for this position, what are the expectations of the ideal person for this job?)
   • Sell yourself.

5. After the interview.
   • Write a thank-you note to the interviewer.

6. Continuously seek ways to “sharpen your saw.”
   • Join professional or industry associations.
   • Attend seminars and conferences.
   • Seek volunteer positions that will build your skills.