LEAD

Handbook for Human Resource Management and Development in Micro- and Small Enterprises

- A hands-on guide for raising awareness on managing and developing human resources in your company -

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Budapest Business School
Budapest, 2023

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ISBN 978-615-6342-51-5

https://doi.org/10.29180/978-615-6342-51-5

ERASMUS+ KA220-VET - Cooperation Partnerships
2021-1-HU01-KA220-VET-000033052
LEAD – LEarning And Development in micro- and small enterprises

Co-funded by the European Union

This project has been funded with support from the European Commission.

The European Commission support for the production of this publication does not constitute endorsement of the contents which reflects the views only of the authors, and the Commission cannot be held responsi ble for any use which may be made of the information contained therein.

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CHAPTER 1 – INTRODUCTION

The aim of the LEAD project is to facilitate the effective transformation of the learning ecosystems around Micro- and Small Enterprises (MSEs) in the participating countries (Belgium, Croatia, Estonia, France, Hungary, Poland and Portugal). The project straightforwardly addresses the improvement of such Human Resource Development activities that directly and indirectly promote learning capability of the target group, both at the management and the employee level. The main ambition of the project participants is to make changes in the entrepreneurial and managerial orientations and attitudes of the MSE owners/managers in favour of better adjustment to external changes via continuous learning and development. One of the project results supporting these goals is this Handbook. The Handbook is expected to give guidance for the owner/managers of micro and small enterprises for the elaboration of a strategy of staff (owner/manager included) further trainings, for the student target group (future MSE owners/managers) and for MSE advisors as specialisation.

The content of the Handbook is based on a comparative research, that was carried out in the participating countries. The comparative report highlights the role that human capital development and vocational training plays in the development of growing, productive economies. There is limited evidence associated with the management and development of human resources in the MSE context. What evidence there is, suggests that MSEs are distinctive because of their pervasive informality and the absence of formal HR and management practices more generally. Human Resource Development is likely to be largely ad hoc and informal in response to specific business needs as and when they arise. Knowledge and skills are acquired mostly on the job and through informal mechanisms such as peer to peer and experiential learning. The owner/manager of an MSE can play a key role as a teacher or as an enabler of learning. Whilst employees can have a say in the management of an MSE, the case studies reinforce the concentration of decision-making in the hands of the owner-manager. The owner-managers knowledge and orientation are a significant factor in the environment influencing recruitment, learning and development in the MSE context. Whilst some owner-managers may pursue growth and create expansive learning environments, others may create environments which restrict the opportunities for growth, learning and development. The action-oriented and informal nature of activity in the MSE context points to the need for a reflective, context sensitive approach to learning. Our findings suggest that this Handbook should encourage the learner to reflect on MSE owner-manager practice and support the consideration of the potential for change and development in MSE activity. Accordingly, the aim of this Handbook is to provide a practical help to the reader in developing your skills in managing human resources and learning effectively.

THE BENEFIT TO YOU

The Handbook addresses two main topics: The theoretical background of the evolutive expansion of MSEs, based on Greiner's model of growth.

Practical methods and tools for developing the Human Resource Management (HRM) and Human Resource Development (HRD) in MSEs.

HOW TO READ THE HANDBOOK?

All the materials in the Handbook are designed to support self-directed learning. The practical tools and methods are grouped around the most important thematic issues determining HRM and HRD practices. The practical part provides a coherent framework for understanding the broader framework, still, you can start anywhere, depending on the nature of your problem to be solved.

We are in the hope that the Handbook will support you in advancing your knowledge on how to manage human resources and how to inspire and facilitate learning in your organisation.

CHAPTER 2 - ADJUSTED GREINER MODEL FOR SME GROWTH

1. INTRODUCTION

Growth barriers for SMEs are a topic of interest to the European Union, national governments, and researchers dealing with the issue. The reason for this interest is caused by fact that small and medium-sized enterprises (SMEs), which represent 99% of all businesses in the EU, play a pivotal role in its economy (Szczepański, 2016, p. 1). But undoubtedly, entrepreneurs themselves are the most interested in this topic. Often, in emerging research or studies of governmental and pan-national institutions, the catalogue of barriers refers to the environment in which organizations operate. For example, in the study entitled „Barriers to SME growth in Europe," European Parliamentary Research Service points to such significant barriers as financial, and administrative burdens and taxation. This is not a separate view of the subject.

The existence of barriers in the financial or tax administration area is undoubtedly a fact. Entrepreneurs quite often point to them as the main barriers to business development. Indeed, the environment of an organization only sometimes facilitates growth. However, the tendency to identify barriers outside the organization causes us to not see what is closest to us - the inside of the company and the barriers within itself. Based on three short cases, let's try to illustrate the problem.

2. INTERNAL BARRIERS - CASES

The shoemaker's son always goes barefoot

For several months now, every day of Ralph has been the same. Morning route in traffic jams, strong "Polish way coffee", and work in which he is so involved until the evening.

Ralph is a partner in a consulting company he founded with two other partners ten years ago. Since then, the company, founded by three college colleagues, has grown considerably. It was not easy. The first clients, usually medium-sized companies, attracted through a system of recommendations and finally establishing cooperation with a large international consulting company as a representative on the local market.

At the company's beginning, the partners rented a small office, working on projects alone with no employees. With time, it was possible to recruit the first qualified employees, encouraged not so much by the basic salary but by the bonus system, in which the compensation was directly dependent on the individually worked out budget. This system worked great and was highly motivating. In principle, there was no maximum salary limit. How many customers will you bring? How many projects will you complete? How high will you bill the client? It all influenced the amount of remuneration based on the quasi-commission system.

Over the years, the partners have managed and developed the company by contributing through their continuation to work as business consultants. After all, they like their job and know it is probably the best in the company.

Ralph cannot complain, and neither can his partners. They were successful, financially, for sure. They are now renting a comfortable office in the capital's business centre.

Thanks to the acquisition of several large and very well-paid projects in the last months, the partners decided to increase employment from 12 people to 25, mainly by employing promising graduates of the local university's business school for the positions of junior consultants. The idea of hiring was to relieve not only partners but also senior consultants who, in the current arrangement, despite their extensive experience due to the workload, had problems with the timely implementation of projects.

Another day at work. Same again, like in The Groundhog Day movie... Again, evening and Ralph is at work. Yes, he likes the job, but there are some limits. "What went wrong?" - he thinks. We hired new people, but they were unable to meet the assumed budgets and left the company quite quickly. And we hired new ones again, and the same pattern repeats. This rotation in the positions of junior consultants means that to complete projects in time, senior consultants and partners have to work 12 hours a day. Why are these people leaving the company? Why are they not able to make a satisfactory contribution to our projects? Why is the cooperation between senior consultants and new employees not going well? Is this our organizational culture? Team chemistry? Does it have to be this way that to keep the company, we will have to forget about our private life?

1. Not so fast, dear Angelica!
Identify more it's a second case

When Angelica told her employees that she was handing over company management to her son Martin, everyone froze. After 30 years of leadership over a dynamically developing production company in the industrial and automotive chemicals industry, its founder and recognized entrepreneur decided to retire. The employees of the family business did not appreciate Martin. Everyone considered him an intelligent boy from a wealthy home whose life goal was only to fulfil his whims and passions. Perhaps they had reasons to think so since they all lived in one town and knew each other very well.

Angelica knew everything about her company and had great respect among the staff. She was a specialist in the field of chemistry, as well as an efficient manager. All the more and less crucial decisions rested on her shoulders. In case of doubts, employees always had the opportunity to talk to their boss and obtain an opinion that helped them make decisions - even in the late evening hours when the second shift was working. Until now, management was based on the knowledge and experience of the owner, who knew her employees inside out - she had no higher education. In Angelica's eyes, managerial positions were occupied by experienced employees predisposed to perform executive functions. This situation was actual until the grandmother of the family retired.

The decision-making process was based mainly on Angelica's final opinion, who has now cut herself off from her company's activities. The resulting decision chaos could be observed the day after Angelica's departure ... in situations where the management staff, unsure of their actions, were reluctant to ask the boss for help - after all, he was only the heir of the family property, who was quickly squandering. Despite its dynamic development, the company relied only on the boss's direct relations - with the environment and employees. The processes of formalization of the processes that take place in it have been forgotten.

The lack of trust in Martin and the uncertainty of the managers' decision-making resulted in decision paralysis. The day-to-day activities of the company stood still. Managers, bypassing Martin, organized meetings among themselves to find solutions to their dilemmas and problems. During the sessions, the question was often asked: "What would Angelica do in this situation?"

Angelica treated the employees like family, always helped them, and appointed managers as she saw fit. The tasks performed by the managers followed Angelica's guidelines but were not written down in any way. The scope of duties often changes depending on the situation and the need of the moment. After Angelica's son took over power, it caused uncertainty about what the manager could do and what not? To what extent can it make a decision, and at what time? In critical situations, when consultations between managers did not help in their decision-making, they asked Martin, who always replied, "Give me a moment to think," and immediately called his mother for advice. They saw it as a last resort and an "informal route" to Angelica.

After a month of Martin's constant phone calls to her mother for help, Angelica began to appear in the company. Very rarely at first, but with time her visits became the norm. The company then started operating as before, and decisions were made on an ongoing basis.

Apparently, Angelica was not scheduled to take a well-deserved but seemingly "premature" retirement.

2. "Instead of interrupting, work on attracting" same

Mark was on the way to his company. He hadn't started work as yet, but felt drained already. It shouldn't be like that. His marketing company, which he owned, recently successfully completed an extensive rebranding project for one of the country's most significant players in the energy market.

- Where has my business involvement gone? - he thought. Instead of doing what I like the most, i.e., working with clients, implementing marketing projects, and developing strategies, I have to deal with making even the most minor decisions for employees.

The vegan coffee with oat milk prepared by John - his assistant, did not improve Mark's mood. Oat milk? Really? Is it hard to remember that I don't like it? Do I have to control everything in the company and keep an eye on everyone?

The following minutes at work did not improve Mark's mood. E-mails were simply inundated with questions from employees regarding almost all aspects related to the functioning of the company. Only 40 employees and so many problems. Decisions, decisions, decisions.

Why does it keep repeating?

Mark has read management books and knows that to develop the company, he must promote employees to managerial positions. He did it over a year ago. This should relieve him of the company's current management, and here the situation has not improved much. He appointed the best specialists in their disciplines (strategy, creation, media) as managers of individual departments. They should be dealing with these issues, not him. After all, they are (should be), as Mark reads in professional literature, "heads of competence centres."

The later, the worse. There are two letters on Mark's desk. Both of them ask to terminate their employment contract, and it is from key employees with extensive experience. They were the leading contractors in the successfully completed project. Couldn't they talk earlier or at least hand him over the notice in a person? Well, they mentioned something about bonus expectations, but was it that important? Work, it's not about money, it's passion. Yet they had been cooperating for so many years. Thanks to Mark that they acquired experience and unique knowledge. They'll probably go to our competitor(s), Mark thought.

What do Ralph, Angelica, and Mark have in common? The described entrepreneurs found themselves in different, but paradoxically similar situations.

In the cases mentioned above, we can observe symptoms of the same set of problems revealed at different times. An unsuccessful attempt at succession, the departure of employees, a decrease in operational efficiency, and the inability to face new challenges may be just one of the symptoms of a crisis that has been growing for a long time. All the characters in the described cases probably have been involved in chronic fire-fighting in their companies for a long time instead of developing their business. Operational activities and micromanagement have replaced strategic planning and focus on business development.

What is the cause of this state of affairs? Generally speaking, it is a maladjustment of organizational solutions to the scale of the conducted activity. This solution covers several areas, such as management systems, formalization, human resource management, development, and learning in the enterprise.

This problem in management is discussed in several similar approaches from the perspective of the organization's maturity, development, and growth.

The life cycle of an organization is a permanent feature of the functioning of any economic organization. The development phases of the organization have found their place in the literature on the subject and have been supported by scientific research. The position of SME plays a unique role in this matter, as the structure of entrepreneurship in most countries in the world is based on micro, small and medium-sized enterprises. The case studies presented above show organizational dysfunctions based on various functional areas.

For this publication, selected approaches to organizational development will be presented. The first studies were introduced in the 1960s thanks to the publication of Steinmetz (1969), who, in four stages, describes a model closely related to the state of organizational resources (employees and assets) and the competencies of owners/managers. However, the most popular of them is the proposal of Greiner (1972), which, despite the distant moment of its creation, is applicable nowadays.

3. GREINER GROWTH MODEL AND SMES (THE GREINER APPROACH FOR SME)

The model of company development stages was proposed by Larry Greiner who believed that a company, during its existence, consistently goes through 5 phases of growth: growth through creativity, growth through direction, growth through delegation, growth through coordination, and growth through collaboration (Figure 1).

Each stage of the company's growth has 2 distinct phases: evolutionary development and revolutionary development. During the period of evolutionary development, sales and profits of the company grow gradually, without strong jumps. During the period of revolutionary development, internal conflicts occur in the company, which cause a mismatch between the tasks and the style of company management, sales and profits may temporarily decrease, but then return to the growth curve. The task of management at the stage of revolutionary business development is to quickly adapt and implement new management tools.

The duration of the company's evolutionary period varies depending on the industry and averages from 4 to 8 years. In young and dynamic industries, companies grow rapidly, and evolutionary stages change quickly. In mature industries, the evolutionary stage of a company's development is very slow.

Figure 1. The Five Phases of Business Growth
Source: Lewis & Churchill (1983)

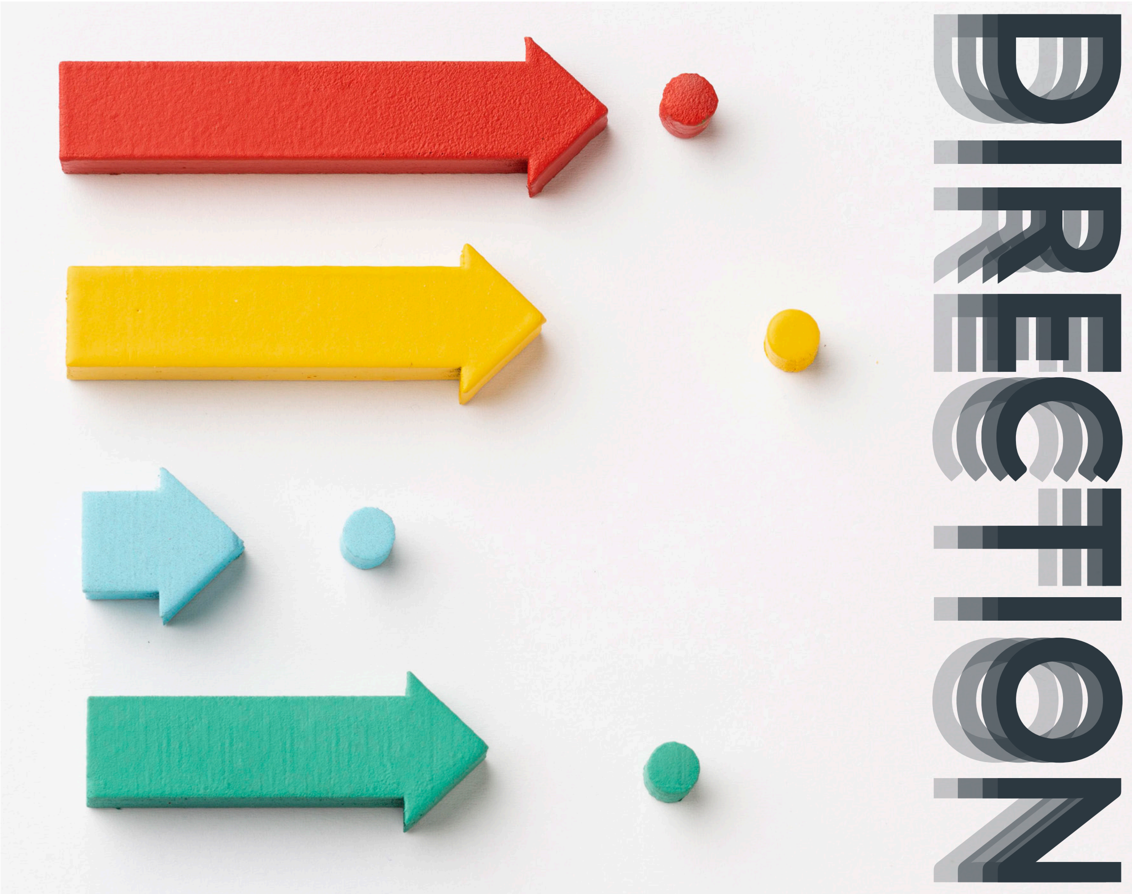
Creativity

At the first, initial stage of its growth, the company only creates its product and defines the boundaries of its market. The rapid growth of the business at this stage leads to a crisis of leadership. The larger the company becomes, the higher the competence of the management staff should be. The owner or a hired manager must monitor and improve the performance of a growing number of employees.

Informal management becomes impossible with an increase in the number of employees. Therefore, the founder must introduce a more formalized form of management into the company, establish rules and principles of work.

The company develops thanks to the creative potential of the founders, who are not professional managers, but have unique entrepreneurial skills or professional knowledge in one of the industries, which makes possible the development of the product and its market promotion. The informal organizational structure is supported by nepotism, the enthusiasm of the founders and overworking of employees, which are offset by modest earnings, high hopes for future income and informal communication. Micro businesses can operate successfully with this style of management for a long time, provided that the volume of production is stable. Growing organizations can no longer be run solely by the founders: the problems associated with strategic disagreements between them are accumulating.

The main question of the leadership crisis is where to lead the organization and who will be able to do it. The way out of the crisis requires the creation of a formalized management structure with clear instructions and division of responsibility, increased control (formalization of reporting, budget planning) and professional management.



Direction

After establishing clear rules for working in the company, another stable growth in sales begins. The company is growing, there are new departments and new management staff. The increase in the size of business is the cause of a new crisis - the crisis of autonomy. Middle managers lose their productivity due to a rigid system of centralized control. The need to coordinate decisions with higher management, the inability to make decisions on their own slow down important processes in the company.

At this stage, there is a vertical and horizontal division of labor, the creation of a functional organizational structure and the formalization of communications. Professional selection of personnel, standardization and work planning lead to a sharp increase in efficiency. The high centralization of decision-making, the expansion of areas of activity and its geography, lead to excessive bureaucratization of management, reduced flexibility and speed of decision-making, limiting the creativity of middle managers. Due to the excessive load on the middle managerial level from the top, a crisis of autonomy arises, the essence of which is in a different understanding of the necessary and sufficient freedom at different levels of management.

The company can overcome the crisis of autonomy if it gives more power to the lower levels in the company. The business leader must learn and properly set up delegation processes in the company.

Collaboration

Successful overcoming of the crisis of autonomy is associated with structural restructuring and decentralization of functions, as well as the subsequent delegation of authority to make certain decisions from higher levels to lower ones. First of all, in a growing organization, the leaders of individual business units and geographic areas are granted with significant power. There are completely new, unique systems of labor motivation, such as bonuses and participation in the company's profits. Middle managers are delegated enough power and authority to penetrate new markets and develop new products. The top of the company focuses on the overall strategic development and gradually loses control over the expanded and more complex organization.

However, decentralization eventually causes a new crisis - a crisis of control, when top managers begin to realize that they are losing control over the organization as a whole. Those organizations that move forward find a reason to solve the problem in the use of special methods of coordination.

Coordination

Thanks to the adoption of coordinated decisions, the company again enters the line of growth. Now all decisions are aligned with the overall mission of the company and with the overall goals of top management, the risk of errors becomes minimal. But the emergence of new points of control in a large company leads to the development of red tape. Procedures take precedence over the decisions and tasks of the company. The tendencies towards centralization prevailing at this stage of the company's development are determined by the need to coordinate the activities of numerous specialized and spatially disparate divisions into a single whole that corresponds to the company's development strategy. Incentive mechanisms, organizational procedures and control mechanisms are being improved, due to which the organization receives a new impetus for development. Further strengthening of bureaucratic tendencies leads to a red tape - a decrease in trust between different management levels and departments as such. Procedures that override problem solving hinder innovation.

An overgrown organization is poorly managed through formalized procedures, and the costs of coordinating its complex structure begin to outweigh its benefits. The company cannot more effectively respond to market changes. Overcoming the crisis of bureaucracy depends on teamwork skills and their development, since it is necessary to strengthen horizontal links in the organization in order to ensure full interaction between various functional and geographical units. The company should abandon the units that complicate its management, transferring their functions on a contract basis to other organizations.

Collaboration

At the final stage of its growth, the company is revising the relationship building within the company. This stage is characterized by the emergence of teamwork to solve the tasks set, corporate personnel are reduced, formal management systems are simplified, the number of discussions in the form of open conferences increases, and a system of personnel training appears within the company.

The crisis at the last stage of the company's growth has not yet received its name. Greiner believed that this crisis will be associated with the physical and moral exhaustion of the employee due to intensive team work on the one hand and the introduction of new ways of working on the other.

The further development of the company involves a dual development of its structure: strengthening the traditional component for performing routine operations, on the one hand, and the reflexive one, which ensures the development of new promising activities, self-learning, on the other.

4. CONSEQUENCES FOR HR MANAGEMENT AND SME TRAINING

SME sector represents more than 99% of all EU companies (Micro: 93%), they contribute significantly to number of offered jobs (approximately 2/3) and value-added (more than 50%) in European economy (EC 2022). But only a small number of SMEs grow during their lifetime so that the Greiner growth model is only partly applicable. Usually, SMEs get stuck within the first two phases (creativity, direction).

However, a lot of challenges that are mentioned beyond the first two stages are relevant for SME management. Characteristic for the first two stages are the strong congruence of the role of the owner and its role in the company management because here leadership and management of the owner are going hand in hand. First, the vision and mission of the owner usually are driving the company in the creativity. Second, increasing coordination problems require a stronger management and formal business structures, i.e. direction is needed but the company still stays owner centred.

Business managers are more concerned about market or financial risks rather than the human-related risks (Hudáková & Masár, 2018). Literature review also reveals that doing business in the SME sector is linked to a number of challenges and shortcomings that are linked to the size and the financial power of the companies:

- Low awareness of own products/services, attraction of new customers and dependency of key clients
- Inability of scaling and growth management
- Problems with maintaining profitability, reducing costs and securing finance
- Recruiting qualitied workforce, and Retaining valuable employees
- Addressing demographic changes (e.g., growing number of elderly employees)
- Insufficient time, quality, risk, knowledge and process management
- Missing embracing technology, innovation and digitalization approach
- High dependence on the owner/founder
- Underdeveloped corporate governance structure
- Cooperation potentials of SME or business networks in general are not utilized sufficiently
- Missing or limited access to and cooperation with research (e.g. universities/institutes), educational (e.g. high schools) and public sector (e.g. municipalities) partners
- Succession strategy for first owner/founder often neglected and specific problem of succession in family businesses (which represent a significant % of MSEs)
- Limited resources and/or awareness concerning fundamental societal changes (e.g., towards Circular Economy / energy and resource efficiency, gender equality, increasingly cross-cultural working force etc.)

The smaller the enterprise the more important the role of the owner is. In addition to that, a large number of owners believe that the business would fail without them. This leads to autocratic business structures and to overburdening of the owner with the risk of wrong decisions. The normal organizational reaction on this situation would be delegation to other company employees in order to enlarge the expertise in decision making and to generate free time for the owner to focus on more important and strategic issues.

This short inside shows already that delegation is also an important issue for SMEs and while delegation requires strong teams and qualified workforce. This especially applies when it comes to growth issues. SMEs usually are not facing a predictable development. Hence, the business processes are not prepared to be scalable, i.e. growth is related to significant risks that can lead to the collapse of the company. Managers are believed to understand that their company's growth and success go along with taking risks and that a company can go bankrupt even if it is successful (Schwab et al., 2019). Delegation and knowledge sharing can aid in prevention of many risks in organization. Businesses shall engage their employees in training activities on cultivation of delegation skills (Kafaji, 2020).The phase related to coordination reflects into SMEs innovation/ knowledge, quality, risk, process, and time management level as well as to all activities related to scaling and growth management. Here, the inner-company activities and the underlying resources have to be better coordinated, which formulates special requirements for the communication between the employees and the set of organizational frames within the company. Coordination also has an interface towards the clients since the clients and suppliers are initiating business processes and the interaction with the clients and suppliers support the optimization of customer-relation management as well as the facilitation of the company innovation because one of the most important sources of innovation for SME are linked to clients and suppliers.

Finally, the phase dedicated to cooperation sets the frame for the SME in the context of its supply and value chain that defines the business environment. This network environment takes currently place mainly in an international context and requires the mastering of digitalization skills within the SME.

5. QUINN CAMERON GROWTH MODEL AND SMES

An alternative to the Greiner model is the proposal of an integrated model of the organization life cycle created by R. E. Quinn and K. Cameron (1983), which is a synthesis of several other normative models of organization development - see Figure 2.

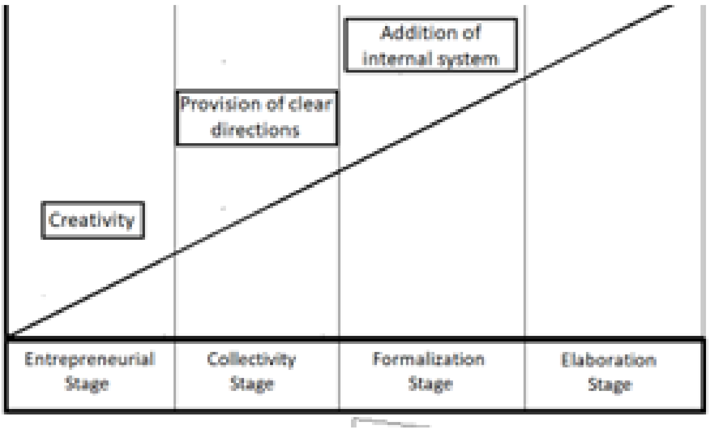


Figure 2. Organizational life cycle by Quinn and Cameron
Source: own elaboration based on Quinn & Cameron (1983)

Depending on the organization's development stage, the model defines the essential criteria of the organization's effectiveness, which should be emphasized in a given phase. The characteristics of the stages occurring in this model and the corresponding efficiency criteria are presented in Table 1.

DEVELOPMENT STAGES	CHARACTERISTICS	THE DOMINANT CRITERION OF EFFECTIVENESS
Entrepreneurial	Organization development through: innovation, creativity, niche formation.	Perception of the organization as an open system, emphasis on flexibility, growth, acquiring resources and developing external support.
Collectivity	High level of employee involvement and leadership of the leader in the organization, informal communication and structure.	Emphasis on human resources development, employee morale, needs, and satisfaction.
Formalization	Stability and institutionalization, operational efficiency, rules and procedures.	Organizations introduce methods such as management by objectives to increase the degree of formalization and control and place emphasis on information management with a focus on criteria related to internal processes and the achievement of measurable goals.
Elaboration	Expansion and decentralization, organizations actively monitor the environment to renew or extend the domain of operation. Most often, there is a change in the organizational structure resulting from changes in functioning.	Emphasis on criteria related to the operation of an organization as an open system, as well as measures associated with the development of human resources and effective achievement of goals.

Table 1. Development phase efficiency criteria
Source: own elaboration based on Szumowski 2011

In shifting criteria of effectiveness model, R. Quinn and K. Cameron, based on literature analysis, distinguish four basic stages of an organization's development: entrepreneurial stage (development of the organization through innovation, creativity); collectivity stage (high level of consistency and commitment); formalization and control stage (stability and institutionalization); elaboration of the structure stage (expansion and decentralization).

Depending on the organization's development stage, essential criteria of the organization's effectiveness are pointed out. R. Quinn and K. Cameron (1983, p. 363) defined four areas of effectiveness criteria. Depending on the development phase of the organization, the emphasis is on a different area. In the first stage of development, the most significant emphasis is placed on the criteria related to the organization's perception as an open system, flexibility, growth, acquiring resources, and the development of external support. In this phase, orientation on the criteria mentioned above determines the survival and development of start-ups. In the second phase, the organization is described and assessed in terms of criteria related to interpersonal relationships. Typical for this development phase is a high level of employee involvement and leadership in the organization. In this development phase, emphasis is placed on the development of human resources, employee morale, their needs, and job satisfaction. This phase should be considered crucial from the perspective of the possibility of further development of the organization and effective functioning in human resources management. In the formalization stage, the organization is characterized by stability, operational efficiency, rules, and procedures. The emphasis is on criteria related to internal processes and the achievement of measurable goals. In the last stage of an organization's development, effective organizations actively monitor the environment to renew or extend the domain of operation. The structure is decentralized, and a proper balance is needed between fragmentation and integration of action. In this phase, the emphasis is both on the criteria related to the organization's operation as an open system and the criteria associated with the development of human resources and effective achievement of goals. The essence of the described model and its primary value mainly indicate that in particular stages of the organization's development, the main emphasis is on other effectiveness criteria. Therefore, for an organization to develop, it should skilfully change its essential effectiveness criteria. In this model, the element related to the implementation of the HR function is treated as one of the dependent variables particularly important for the transition between the entrepreneurial stage and the collective phase, which applies to most small and medium-sized enterprises.

In the case of micro and small enterprises, this model is particularly applicable at the transition stage from the entrepreneurship phase to the team phase. The lack of extensive structures and managerial competencies in implementing basic management functions causes problems that lead to organizational crises. The presented models indicate the direction of actions to counteract these crises.

On the other hand, in the case of medium-sized enterprises, the application of the model applies primarily to the formalization and elaboration phases, where structures and processes are more complex. The scale of operations in these phases increases significantly, so it is necessary to create operating standards that help monitor and control formalized processes. Changes in the organizational structures of companies must be a quick response to the changing conditions of the environment and the stakeholders' behaviour.

6. MATURITY OF AN ORGANIZATION AND ORGANIZATION DEVELOPMENT

The models described above are phase growth models. Their undoubted advantage is taking into account the situational factor, which is the growth phase and the connection (in the form of general recommendations) with the issue of the organization's development (development of an organization).

The emergence of Organization Development (OD) models is a response to the changes in the business environment, in which various variants of introducing these changes are proposed. OD is defined as the ability of an organization to plan changes in the entire system of the company's operations, where knowledge of behavioural sciences is used, which is focused on the human and social processes of the organization, aimed at building skills for adaptation and renewal of the organization (Cummings and Worley, 2001). The implementation of OD models primarily aims to support managers and company owners in the change management process, i.e., their design, planning, and implementation. OD models are not perfect, and their performance only sometimes brings the expected results, but they are a signpost of the course of action.

Mulili and Wong (2011) argue that using a specific model or a combination of various IP models has significantly contributed to the improvement of the organizational effectiveness of many companies and the formulation of strategies adapted to the changes taking place. The most common areas where OD models are used are:

- human resources, where changes are aimed at improving the efficiency of people's work,
- technology where the processes of creating value delivered to the market are improved,
- broadly understood processes where waste is eliminated and its course is optimized (e.g., in administration or logistics),
- management, aimed at increasing the competencies and effectiveness of managers.

The analysis of the growth mentioned above models of the organization allows for the formulation of a catalogue of the most common development barriers for small and medium-sized enterprises, which are an inherent challenge for SMEs. These barriers can be categorized into selected areas: values and goals, management system, owners' awareness of management (see Table 2).

VALUES AND GOALS	MANAGEMENT SYSTEM	OWNERS' AWARENESS OF MANAGEMENT:
• lack of mission and vision of the organization; • focusing on short-term action, no set long-term development goals; • lack of long-term strategic planning; • lack of skills and consistency of entrepreneurs in acquiring resources	• lack of formalized management systems (not always hiring managers leads to the creation of a management system); • making decisions based only on the use of opportunities (not subordinated to goals and strategies); • decisions made spontaneously by managers/owners without the use of advanced tools; • lack of a formalized organizational structure that meets the company's needs; • lack of: formal communication channels, long-term planning and goal setting, formal control procedures, skills in obtaining the necessary resources.	• combining the ownership function with the management function with the scale of operations requiring such separation; • not paying attention to human resources in the organization (random selection of employees, not paying attention to motivational issues); • lack of knowledge in the field of management, failure to apply management methods and techniques to the company's growth phase, • no use of management methods and techniques such as BSC, ZPC; • lack of decision support tools; • maladjustment of the legal form to the scale of the business.

Table 2

The barriers mentioned above limit the possibility of functional changes and application of selected models described in the literature on the subject, which have been supporting owners and managers of companies for years. Therefore, the occurrence of organizational dysfunctions that prevent effective changes, whose primary goal is to develop organizations in the direction they desire, should be eliminated or minimized.

Human resources and its skills, knowledge and behaviour is a major factor in the competitiveness of small firms. Therefore, it is important to pay special attention to it during the whole period of company's existence. Literature suggests that changes in corporate culture, the qualities that employees and managers should have at different stages of a company's history is subject to control as well. Conducting trainings and develop useful skills is extremely important for businesses during the relatively problem less periods over the course of growth, as it can help a company to better cope with the upcoming crisis. There can be a need for training at different levels: organizational, divisional, departmental, team, or individual levels. Research has found that formal training increased employees' productivity by 230% compared to the untrained personnel.

CHAPTER 3: PRACTICAL METHODS AND TOOLS IN HRM AND HRD

This Chapter provides useful practical tools and methods that can be acquired by self-directed learning. You can apply them in various situations without having resort on external help or advise. The chapter consists of four parts covering various functional areas of Human Resource Management (HRM) and Human Resource Development (HRD). The structure of the chapter is as follows:

PART 1: DIAGNOSIS
Tools supporting SME/MSE owners in analysing their current position in HRM/HRD (e.g. competence mapping)

PART 2: RECRUITMENT/ENTRANCE
Tools and exercises in ensuring labour for SMEs/MSEs (e.g. interview making, selection tools, onboarding practices, etc.)

PART 3: MOTIVATION/PERFORMANCE
Tools for supporting SME/MSE owners in managing employee performance (productivity) and in people management

PART 4: DEVELOPMENT (LEARNING/ADAPTATION/FLEXIBILITY)
Tools that foster learning and development of labour force in SMEs/MSEs

The Handbook contains the detailed description of all tools/exercises that can be used in solving various HR-related problems. The exercises are presented in a very comprehensive way with clear and detailed instructions containing the following elements.

WHEN TO USE IT

A brief overview on the situation(s) when the method or tool can be applied effectively.

WHY IT IS HELPFUL?

It gives you some insights on how the method/tool can help you in solving your problem or in finding a solution for a concrete situation.

WHAT YOU GET

A description of what you can benefit from using the method.

LET'S LOOK AN EXAMPLE

We demonstrate the application of the method through a concrete example.

INSTRUCTIONS

Step-by-step instructions are provided for easing the use of the method/tool.

TIPPS AND LESSONS FROM OTHERS

It highlights the lessons that others have learned using the method in different situations.

You have your own problems related to HRM and/or HRD. You can take the tools presented in the Handbook and change them according to your needs. You can adapt them easily as they were designed to work in various contexts. Some exercises contain questionnaires/forms to fill in. These are also available for printing in the Appendix.

PART 1: DIAGNOSIS

This part will you get started. Designing any Human Resource Development (HRD) activities or establishing an HRD strategy rests on being aware of the skills shortages and the relevant training and development needs in your company. This part provides you two basic methods in diagnosing and analysing these shortages and needs. It takes an action-oriented stance, focusing on practical tools. In this part you will be familiar with two analytical techniques.

Skill matrix will support you to map the skill asset of your company, incorporated by your colleagues and employees. As a logical next step, **Training needs diagnosis** helps you make a better understanding of the training demands of your company, as a starting point to design a training and development plan.

1. SKILLS MATRIX

The definition and strategic value of skills matrix management

- Definition of skills matrix

A skills matrix is a framework used to map employees' skills and their levels. It's a grid that contains information about available skills and their evaluation. It is used to manage, plan, and monitor existing and desired skills for a role, team, department, project, or an entire company.

- Typology of skills

The matrix can be divided into specific job roles within a project, or it might show all talents required to fulfil every aspect of the project. Each team member is often given a rating based on their skill and desire in acquiring and use a specific talent. This enables leaders to properly distribute jobs to team members who desire to use their relevant skills for the work and successfully finish it.

The role of skills matrix in HRM

- Skills-based Human Resource Management

The skill matrix helps HR professionals to find out who has the right skills to fill a given position. It will help your HR department make better decisions about recruitment, retention, and staff training. The value of a skills matrix is in objectively identifying what skills are needed to achieve organizational goals. In this way, an organization can get a clear picture of the specific skills they need to learn and what employees can do. It also helps you assess employees that have appropriate training for each job opening. A skills matrix can show which employees have already mastered certain tasks and what key skills they may need to learn. It allows you to see any skill gaps within your company which can lead to a time wastage when someone takes on a task they aren't qualified to do. It also helps companies keep track of their employees' strengths and utilize them in a more effective way within the business.

Skills management tools

- Identifying the Right People for Your Project
- Offering a Competitive Edge to Your Organization
- Developing Effective Training Programs
- Tracking Employees' Skills Across Various Departments
- Future Planning

THE TOOL: SKILL MATRIX

• Determine the skills needed to complete a project. Determining the skills needed for a project will help create a kick-off point for your matrix. Being highly specific in this step will make the matrix more efficient.

• Determine each team member's current level of skills. Once you have the skills listed in rows, the next question is, how do you score the skills matrix. You can start by listing every team member in a column and gauging their experience or expertise concerning the particular skill. You can complete this skill assessment with reviews and interviews, or through testing. While recording skill levels, use a number scale to plot different levels. An easy system to follow would be assigning numbers 0 to 4, starting from no competency and going up to the advanced level of competency.

• Record each team member's level of interest in a skill. After plotting skill level, you should also record the level of interest shown by team members for each skill. This helps you track whether team members work on tasks they enjoy and find stimulating. You will prevent burnout and increase satisfaction by matching interests with tasks. This step helps ensure that you also take the talent's perspective while creating the matrix.

• Use the information from the skills matrix to determine any missing skills needed. Finally, once you have plotted each worker's level against the required skills, you can look for any gaps in your desired skill set. Using this information, you can track training needs and use that to create effective training programs, or shuffle how workers have been allocated to optimize productivity.

TEAM MEMBER	SKILL 1	SKILL 2	Skill 3	Skill 4	Skill 5	Skill 6
HR1	/10	/10	/10	/10	/10	/10
HR2	/10	/10	/10	/10	/10	/10
HR3	/10	/10	/10	/10	/10	/10
HR4	/10	/10	/10	/10	/10	/10
HR6	/10	/10	/10	/10	/10	/10
...	/10	/10	/10	/10	/10	/10

Table 3. Structure of the skill matrix.

WHEN YOU USE IT

- To identify the right people for your project
- To offer competitive edge to your organization
- To develop effective training programs
- To track employees' skills across various departments
- To future planning
- Identify the most important activities of a job
- Analyse the activities where performance is insufficient to identify the skills to be developed
- Clarify the necessary skills, the prerequisites, during a recruitment
- Define a realistic training path
- Orient an employee to define the skills mastered and the proximity with another job

WHY IT IS HELPFUL

Skills matrix offer a number of benefits related to proper staffing and training.

- Identify the right person for a job.One of the benefits of having a skills matrix in place is the ability to quickly identify and place the right talent for a specific job or task. This helps you move projects faster and ensure the best allocation of resources. Skills matrices are an efficient tool that aids the delegation of tasks and allocation of resources.
- Identify gaps in skill sets. With a completed skills matrix, you can identify gaps in teams, departments, or even your whole organization. This can help pinpoint any missing pieces that are holding the company back from optimum performance. Once you're aware of the gaps in your organization's skill sets, you can craft training programs that will add value and improve the contribution of your professional talent. On a smaller scale, team performance can also be optimized once you're aware of the strengths and weaknesses of members.
- Allocate resources efficiently. The ability to quickly switch professionals between teams and allocate them where their skills are required is a great advantage of a skills matrix. As you save time that would otherwise be spent in identifying the right person for a task, you also save money and increase productivity and motivation.
- Track professional progress. A skills matrix can go beyond just aiding the identification and allocation of the right person to a task. It can also help you track professional progress on a regular basis. The learning and development department can use the matrix to their advantage and track how effective their

training programs have been. Most importantly, the matrix can help you benchmark certain goals and conduct performance reviews. They are also useful for anyone looking to chart a career path and work on the skills they are currently missing.

- Speed up the hiring process. When you lose talent in your organization, a skills matrix can work as a readymade description of skills and competencies that suitable candidates must possess in order to efficiently fill the open position.
- Help eliminate bias during the hiring process. Humans have unconscious biases (e.g., confirmation bias and affinity bias) that can manifest during the interview process. If you use a skills matrix to codify the skill set needed for a particular role, (which should be found in the job profile) it can help reduce the odds of you hiring the wrong person because of your favouritism.

The Competence Map ensures the clarification of the activity: for the manager as well as for the employee, both are clear with the expected competencies.
It is:

- A concerted approach
- A concrete and reliable observation
- A rigorous methodology
- A tool for dialogue
- A living document to be updated
- A readable and operational document

WHAT YOU GET

Skills matrix can be as simple as a two-dimensional table in Excel or represented pictorially using Harvey Balls or other visual formats. Companies who want to do skill assessment at scale and more effectively can also use a software platform for evaluating their workforce.

LET'S LOOK AN EXAMPLE

A company that manages shopping centres wants to develop a marketing campaign. To do so, the company wanted to identify which HRs it had to lead the campaign. To this end, it placed its HRs in the skills matrix (rows) and the most important skills (columns) that HR should have to lead the campaign. Subsequently, it evaluated the HRs by assigning a score to each skill that the HR had.

TEAM MEMBER	Communication	Campaign management	Content marketing	Webinar management	Social media marketing	Design skills
Maria	5/10	6/10	3/10	9/10	3/10	7/10
Joanna	4/10	4/10	6/10	7/10	4/10	4/10
Rodolph	10/10	5/10	1/10	2/10	6/10	7/10
Priscila	8/10	3/10	2/10	7/10	3/10	9/10
Anne	2/10	3/10	8/10	6/10	6/10	3/10
Cristian	1/10	7/10	3/10	7/10	1/10	6/10

Table 4. Skills matrix for develop a marketing campaign

INSTRUCTIONS

• Assess the skills required to complete a project successfully.

You can do this by looking at the skills needed for different roles within the team or department. Include skills that are essential to success, desirable but not necessary.

• Evaluate your employees' skills and interests

The methods employers use to evaluate their workforce's skills vary across organizations. It's always beneficial to have multiple stages of employee evaluation. For example, a marketing associate who self-declares his/her expertise and interests in Google Ads should only be tested for and assigned to projects that need a Google Ads expert.

• Add the data in a table or a matrix.

One of the most common ways to create a skills matrix is via Excel. Follow the below steps to create a skills matrix in an Excel document. Create a table or matrix with the skills listed in the first column and name it "Skills or Competency." Write down the team members' names horizontally in the column "Name." Create the columns "Expertise" and "Interest" under Name. Add the data on expertise and interest level collected earlier. Doing this will give you an overview of each employee's abilities. Sort the skills into categories based on their contribution to practical project completion

• Map employees with the right skills

Consider the skills needed for each role and map them to employees who have those skills. Employees with specific skills can also use this information to identify skills gaps and bridge those gaps. Doing this will give you an overview of the skills proficiency of every employee. Sort the skills into categories based on their contribution to practical project completion.

• Use the skills matrix to identify training needs and allocate assignments.

Create training and development programs that will help employees improve their skills. If there are skills that many employees do not currently hold, consider bringing in a trainer to deliver a workshop. This will help employees develop the skills to succeed in their roles and projects.

TIPPS AND LESSONS FROM OTHERS

• Ask managers and team members for feedback about which skills they have and need to succeed in their role or project. Look at employees' resumes to get an idea of their skills.
• Do not create a skills matrix without first assessing the skills required for a successful project, which will ensure that your approach is complete - taking in both employee and company perspectives
• Do not forget to include skills essential for success in each role.
• Do not forget to map skills to team members and roles accordingly. This will ensure the accuracy of the skills matrix.
• Do not underestimate the benefits of creating a skills matrix for your employees. From finding internal employees who can fill skills gaps to identifying skills training needs, skills matrices can help you recruit and retain the right talent for your organization.
• The repository must remain alive, open and always updatable. If the actors concerned do not appropriate it, it will remain formal, unused and quickly obsolete.
• It is not necessary to analyse all the activities, at the risk of providing a large list of competences and a certain lack of legibility. It is therefore necessary to determine the objectives pursued by the creation of the Reference System.

2. TRAINING NEEDS DIAGNOSIS

Diagnosing training needs consists of identifying deficits at an individual and/or collective level in terms of knowledge, skills and behaviour, with the aim of developing a training plan. The diagnosis phase is considered one of the most important in the training cycle, as it largely determines all phases of the process and directly supports the preparation of the training plan. It is an essential phase for the entire training cycle to add value. Only with a structured diagnosis, with coherent and well-founded data, it is possible to develop training plans that are in line with the needs of employees. Only after knowing these needs is it possible to mobilize the necessary resources, in order to provide employees with the necessary tools to develop their work better and with greater productivity.

WHEN TO USE IT

The diagnosis of training needs should be part of a strategy to improve the quality and development of an organisation, activity sector or community. It is necessary to carry out a diagnosis before starting training, as it allows identifying aspects that may compromise the effectiveness of training. The diagnosis should be oriented in two directions:

- reactive (identification of current needs and maladjustments that prevent better performance)
- proactive (identification of long-term needs so that the future can be prepared in advance).

HOW

The diagnosis of training needs is carried out through a process of collection, selection, treatment and interpretation of data that will lead to the diagnosis, comprising different levels of analysis. Several authors have studied this theme, considering three dominant levels of analysis: organizational analysis, functional analysis, personal analysis.

Organizational analysis requires the study of available resources, the specific conditions of the organization or sector, the technical system, labour relations. Ultimately, the aim is to know where and when training is needed, with the aim of ensuring a direct relationship between training and the strategy of the organization or sector of activity. It is at this level of analysis that the importance of the proactive character of the diagnosis emerges, preventing the obsolescence of competences.
Functional analysis requires the study of conditions, equipment, knowledge and skills

necessary for the performance of a function. It is relevant in this context the fact that the introduction of increasingly sophisticated technologies often determines a significant change in the type of skills needed to effectively carry out certain tasks.
Personal analysis requires the evaluation of a professional performance, as well as the actions and conditions necessary to reach the required level for the performance of the function. It is about gathering information about actual performance and desired performance.

HOW TO APPLY

The first step in training needs diagnosis is to assess the performance of the organization and its employees. Therefore, two levels of analysis should be defined:
a) The current situation. The current state of knowledge, attitudes and skills of current or future employees must be determined. This analysis must consider the organizational objectives, the climate and the internal and external conditions of the organization.
b) The necessary/desired situation. The necessary or desired conditions for organizational success are identified here. It can go through the definition of requirements at the level of the employees' jobs: the knowledge and skills necessary to carry out the work successfully.

What is the level of knowledge or skill proficiency that we need to achieve the objectives we intend to achieve based on current conditions? The difference between these two situations, the desired one and the current one, highlights gaps that can be filled with the development of adequate training plans. This is what is intended with the definition of these two situations.

INSTRUCTIONS

For a correct diagnosis, it is necessary to develop instruments that allow obtaining data that allow an interpretation of the state of things, both the current situation and the desired situation. These instruments must be built specifically considering the specific characteristics of the target audience or the organization, and each of the levels of analysis: the organization, the job and the expectations and needs felt by each of those targeted.

The collection of information is carried out using the analysis of various variables, such as:

- efficiency and organizational climate indices
- critical incidents method
- performance observation and evaluation
- interviews
- brainstorming
- surveys and questionnaires
- direct observation
- document analysis

LET'S LOOK AN EXAMPLE

A. Socio-professional characterization

1. Gender: Male ☐ Feminine ☐
2. Birthdate: Year _____Month ______Day______
3. Adress (District): ____
4. Academic Qualifications (Check only the maximum degree you have).

Less than 9th grade ☐	Graduate, without conclude ☐	PhD ☐
Less than high school ☐	Graduate **Course** ____________________ ☐	Other: ______________
high school ☐	Master degree ________________________ ☐	

5. Profession (Identify the profession in full). If you are unemployed, identify your last profession. If you belong to a military force, refer to your specialty, regardless of the rank you occupy.

6. **Professional status** (Check your current situation)

Unemployed	☐
Self-employed ______________________ Sector of activity: (e.g. Education, Health)	☐
Employee	☐
Inactive **(e.g. Retirees)** **Your survey ended here.** **Thank you for your participation!**	☐
Employee Sector of activity of the company where you work: (e.g. Education, Health) ______________________ Direction/ Department/ Service to which it is assigned: (eg Commercial, Administrative) ______________________ Number of employees in the company:	☐ ☐
(approximate, if you don't know exactly):	☐

Analysis of the relationship between professional activities / training

1. Describe your main functions or activities.
   If you are unemployed, use your last job as a reference:

2. Indicate the main difficulties in carrying out the functions or activities mentioned above:

- [ ] Obtain knowledge/skills in some areas
- [ ] Know / better understand the impact of my functions on other functional areas of the company
- [ ] Articulate the different tasks / functions in the times that are needed (Time management difficulties)
- [ ] Articulation of the exercise of these functions with other elements of the organization (Difficulties in Personnel Management/Interpersonal Relationship/Teamwork) Having the necessary means and mechanisms for the proper execution of tasks (Difficulties in physical and methodological resources)
- [ ] Others:

3. Of the difficulties mentioned in the previous point, which ones do you think could be overcome with training? (If you did not complete the previous question, do not complete this question)

4. Identify your professional goals within 1 to 2 years:

- Get a job ☐
- Increase Knowledge ☐
- Achieve professional stability ☐
- Progress professionally ☐
- Change Job ☐
- Others (s): ☐

5. In order to achieve the objectives set out in the previous point, what specific preparation, knowledge and/or skills do you lack or need?

____
____
____
____
____
____
____
____
____
____
____
____
____
____

6. Tick a maximum of three (3) reasons why, in your specific case, you could attend vocational training courses:

Grow professionally	☐
Perform my duties more competently and confidently	☐
Be more protected against unemployment phenomena	☐
Thinking about changing jobs/profession	☐
Contribute to the development of the company where I work Think about building my own job	☐
Develop entrepreneurial and innovative skills capable of contributing to the development of the organization where I work	☐
Entering or re-entering the labour market	☐
Other(s):	☐

C. Characterization of training operationalization indicators

1. Mark with a cross (X) the interest in carrying out these trainings, regardless of the actual conditions for being able to do so (availability of time, financial availability, etc.). Mark a maximum of 3 options as "**Very Interested**"

AREA OF STUDY	Very interested	Medium interested	Low Interested/ No interested
Innovation and Entrepreneurship			
Emotional Intelligence			
Productivity			
People Management			
Conflict Management			
Digital Marketing			
Creative problem solving			
Time Management			
Others			

1.2 For the three (3) areas that you marked as "Very Interesting" in the previous point, specify the main skills/knowledge you need to acquire/improve.

C. Availability to attend training

7. Considering your actual availabilities, place a cross (X) in each column, in the training operationalization options that would be most advantageous to you.

NUMBER OF HOURS PER DAY	Day period		Day of week		Type of Training	
Less than 2 hours	Morning	☐	Monday	☐	Presential	☐
2 to 3 hours	Afternoon	☐	Tuesday	☐	E-learning (distance)	☐
3 to 4 hours	Night	☐	Wednesday	☐	B-learning (mixed training: face -to-face and distance)	☐
4 to 5 hours	Indifferent	☐	Thursday	☐	Seminar	☐
5 to 6 hours			Friday	☐	Indifferent	☐
6 to 7 hours			Saturday	☐		
Indifferent			Sunday	☐		

Suggestions

___

Within the scope of this work, if you wish, you can express your opinion here on any aspect that you consider relevant and that was not addressed.

___

___

___

Thanks for your collaboration!

PART 2: RECRUITMENT/ ENTRANCE

Part 1. presented two methods for analysing your skill and training needs. This part is devoted to the issue of selecting new employees. In a turbulent labour market environment characterised by massive labour shortages, it is a crucial problem, how to find and choose those colleagues, who will fit the culture of your organisation and are properly skilled and motivated. Two technical tools will be presented in this part. **The Employer Interview** supports you in interpersonal communicative situations and provides you a framework for interpreting the interviewees' behaviour. **The Selection Decision Tool** guides you further by developing your skills in making selection decisions. It is a widely used technique for evaluating the candidates and designing the relevant selection criteria.

1. THE EMPLOYMENT INTERVIEW

The individual employment interview is the most familiar method of selection. It involves face-to-face discussion and provides the best opportunity for the establishing of close contact – rapport –between the interviewer and the applicant.

An interviewing includes processing and evaluating evidence about an applicant's skills in relation to the person specification. Some of the evidence will be included in the application form, but the aim of the interview is to supplement this data with more detailed or specific information about competencies, attitudes, experiences and personal qualities that can be obtained in a personal face – to – face meeting (Armstrong, 2006).

Recruitment or selection interviews differ according to the methods used to obtain information and inquire about an applicant's attitudes and feelings. The most important difference between interviewing methods is determined by the amount of structure or control that is exercised by the interviewer. In the highly structured (or directive) interview, the interviewer determines the course that the interview will follow as each question is asked. In the less structured (or non-directive) interview, the applicant plays a larger role in determining the way in which the discussion will go (Nankervis et al., 2020).

In the following table are presented and defined different types of interviews and the most relevant reasons "for" and "against" every type.

Table 5. Types of interviews

TYPE OF INTERVIEW	DEFINITION	FOR	AGAINST
Directive or structured	An interview following a set sequence of questions.	• Consistent – all applicants treated equally • Usually reliable • Time-efficient • All areas covered • Easy to compare applicants	• Can lack flexibility • Some areas ignored which should be followed up • Interviewer may dominate • Applicant may be overwhelmed by questions
Non-directive or non-structured	An unstructured conversational-style interview in which the interviewer pursues points of interest as they come up in response to questions.	• Easy to explore leads and different areas • Applicant may be more relaxed than when using other methods • Can be tailored to individual situation	• Hard to control interview • May miss important areas • Hard to compare different applicants
Panel	An interview in which a group of interviewers questions the applicant.	• Impartial – it is a group decision • Applicant closely observed • One panel member may notice or think of something missed by others • Suited to higher-level appointments	• Cost • Applicant may feel outnumbered or intimidated • Panel members may talk or argue • among themselves • Less chance of establishing rapport
Stress	An interview in which the applicant is made uncomfortable by a series of often rude questions. This technique helps identify hypersensitive applicants and those with low or high stress tolerance.	• Shows applicant's behaviour under conditions causing emotional strain • Can be suited to some high-pressure or unpleasant jobs	• Requires very skilled interviewer • May alienate and lose a suitable applicant • May affect company's public relations image • Relevant to only a few positions • To allow you checking how the candidate deals with stress
Group	A panel interviews several candidates simultaneously.	• Easy to compare applicants • Provides representative work situation • Suited to positions requiring managerial, verbal or interpersonal skills	• Expensive • Hard to assess • May not always relate to the job in question • Not much personal contact
Technology based (Skype/ teleconference)	An interview conducted by using Skype, Zoom, video conferencing or other digital tools.	• Reduced travel/airfare costs • associated with bringing applicant to a physical interview • Improved timeliness as not waiting for applicant to arrange times to travel • Allows for interviewers to assess applicant behaviour and interpersonal skills	• Can only be used if technology available • Verbal lag times due to distance • Unsociable interview times to coincide with international time zones • Stressful for applicant sitting in a room by themselves (in the case of a teleconference interview)

Source: Adapted from Nankervis et al. (2020). Human Resource Strategy and Practice. Cengage Learning Australia Pty Limited, p. 230 & Dessler, G. (2020). Human Resource Management. Sixteenth Edition. New York: Pearson

The role of the employment interview in HRM

The interview forms a major part of the 'classic trio' of selection techniques, the other two being the application form and references (Armstrong, 2006). Interviews are particularly suitable for implementing the recruitment process in micro and small businesses since they are easy to implement and do not require additional financial costs. Because of a variety of advantages, the interview has a very important role in recruiting process as well as in the comprehensive practice of human resource management. For micro and small enterprises, the interview is valuable because it enables owners or managers can make assessment of how candidates would fit into their enterprises and what he or she would be like to work with. At the same time, an interview gives the candidate the same opportunity to assess the organization and job, as well as to ask and clarify potential issues.

The employment interview tools

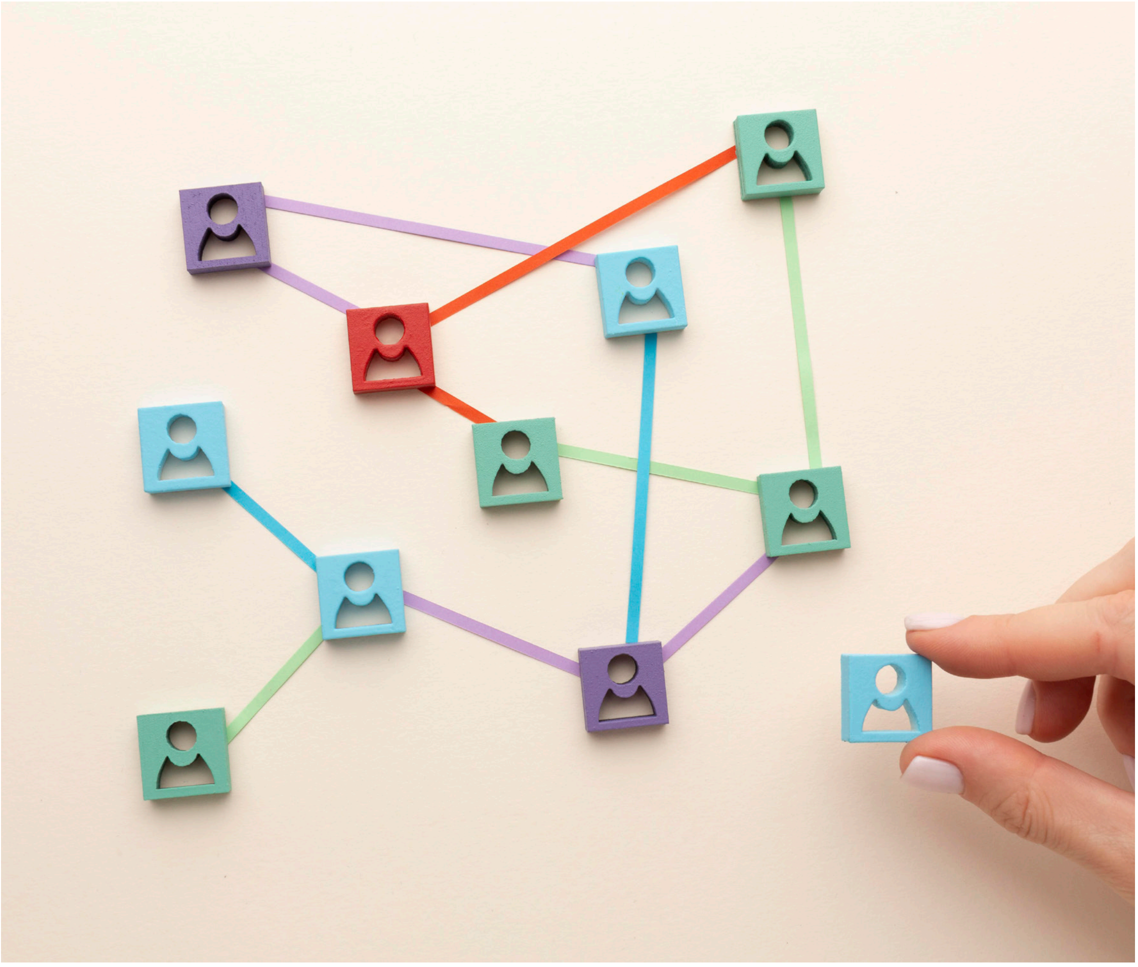
• Analysing job description and planning an interview
• Structuring an interview layout and a creating set of questions
• Conducting interview process
• Evaluating the employee's competencies and skills during the interviewing process

Structured or directive interview

Structured or directive interview presents the most highly structured type of interview which is based on detailed set of questions and prepared forms.

The most relevant features of the structured interviewing process are:
• based exclusively on job duties and competencies that are critical to job performance
• makes use of a range of question types
• has sample answers to each question determined in advance. Interviewee responses are
rated on a scale defined explicitly in advance
• will often use an interview committee or panel so that interviewee responses are evaluated by multiple rates (maybe more common in larger organizations)
• is consistently applied to each applicant. All processes are consistently followed to ensure that each applicant has the same chance as every other applicant
• is documented fully for future reference and also where there is a need to defend the selection decision (Nankervis et al., 2020, p.231).

In structured interviews all interviewers generally ask all applicants the same questions which makes this kind of interview more consistent, reliable, and valid. Furthermore, having a standardized list of questions can also help less talented interviewers conduct better interviews (Dessler, 2020). If possible, it's better to have an additional interview with someone who is not the future manager of the candidate, but will work with him/her; even if it's not a « formal » interview, but a simplified one.



WHEN TO USE IT

- To conduct recruitment process
- To obtain more information about candidates, their competencies and experiences
- To check evidence and references from application form

WHY IT IS HELPFUL

Through personal face–to–face meeting you can assess and obtain more detailed information about relevant candidates' competencies, attitudes and experiences but also verify all evidence included in the application form. You can use the suggested protocol and layout to facilitate and control over interviewing process.

WHAT YOU GET

A standardized and systematic form of interview procedure which can help you to control recruitment process.

LET'S LOOK AN EXAMPLE

Table 6. Protocol or layout of effective structured interview process

Step 1 – Study the job description	Don't start the interview unless you understand the job's duties and what skills you're looking for.
Step 2 – Structure the interview	• Use job knowledge, situational, or behavioural questions. Questions that simply ask for opinions and attitudes, goals and aspirations, and self-evaluations allow candidates to present themselves in an overly favourable manner or avoid revealing weaknesses. • Use the same questions with all candidates. This improves reliability. It also reduces bias by giving all candidates the same opportunity. • For each question, if possible, have several ideal answers and a score • for each. Then rate each candidate's answers against this scale. **Some examples of questions** **Job Knowledge Questions** 1. What steps would you follow in changing the fan belt on a Toyota Camry? 2. What factors would you consider in choosing a computer to use for work? **Experience Questions** 3. What experience have you had actually repairing automobile engines? 4. What experience have you had creating marketing programs for consumer products?
Step 2 – Structure the interview	Behavioural (Past Behaviour) Questions 5. Tell me about a time when you had to deal with a particularly unpleasant person. What was the situation, and how did you handle it? 6. Tell me about a time when you were under a great deal of stress. What was the situation, and how did you handle it? Situational (What Would You Do) Questions 7. Suppose your boss insisted that a presentation had to be finished by tonight, but your subordinate said she has to get home early to attend an online class, so she is unable to help you. What would you do? 8. The CEO just told you that he's planning on firing your boss, with whom you are very close, and replacing him with you. What would you do?
Step 3 – Get organized	• Hold the interview in a private place to minimize interruptions. • Prior to the interview, review the candidate's application and résumé. • Note any areas that are unclear or that may indicate strengths or weaknesses.
Step 4 – Establish rapport	• Start by putting the person at ease. Greet the candidate, and start the interview by asking a noncontroversial question, perhaps about the weather that day.
Step 7 – Close the interview	• Leave time to answer any questions the candidate may have and, if appropriate, to advocate your firm to the candidate. • Try to end the interview on a positive note. • Tell the applicant whether there's any interest and, if so, what the next step will be. • Make rejections diplomatically.
Step 8 – Review the interview	• Once the candidate leaves, review your interview notes, score the interview answers.

Source: Adapted from Dessler (2020). Human Resource Management. Pearson, p. 217 – 218

Table 7. Supplementary Questions for Interviewing Applicants

General Questions	1. Briefly describe yourself. 2. Describe the best/worst job you've ever had. 3. Describe your career goals for the next few years. 4. How much have you learned about us? How did you find out? 5. Describe a problem you are faced with in your current job... How do you propose to improve the situation?
Questions on Work Experience	1. What have you learned most from that job? 2. What kind of supervisor do you work best for? 3. What has been your greatest job accomplishment? 4. Describe the work situation that required the greatest amount of your energy. 5. What kind of tasks do you enjoy most? Least?
Questions on Administrative and Managerial Skills	1. How would you describe your approach to managing people/projects? 2. Most of us have one or more new concepts, projects, or innovations that we are especially proud of creating. Can you describe one such innovation of your own? 3. Sometimes we make a decision that we would like to take back. Give me an example when that has happened to you. 4. What types of specific operations have you managed? 5. How would your employees describe you as a manager?
Questions on Oral Communication and Presentation Skills	1. What is the worst communication problem you have experienced? 2. Tell me about the preparation for and results of meetings you have been responsible for conducting. 3. Have you ever done any public or group speaking? 4. What kind of preparation did you need? 5. What kind of format did you use?
Programming and System Analysis Experience Questions	1. Which programming language do you know well? 2. Please describe the types of databases you have worked with and the extent of your experience? 3. What was your role in developing and implementing software systems? 4. Describe the electronic data processing equipment you have used? 5. What types of application programs have you designed?
Questions on Accounting and Bookkeeping	1. Please describe your experience in financial analysis. 2. What types of budget and other financial forecasts have you prepared. 3. Please list the types of records for which you have been responsible. 4. What experience have you had with audits? 5. Please tell me about different types of budgets for which you have been responsible.

Source: Adapted from University of Baltimore - Guidelines for Successful Recruitment, Selection & Hire

INSTRUCTIONS

- Establish the objectives and scope of each interview
- Review job requirements, application form data, test scores and other available information before seeing the applicant
- Plan the interview so you can structure it properly
- Include questions relevant for job requirements – You can find potential supplementary questions in Table 7
- Use suggested layout as a protocol during your recruitment process
- Adjust the suggested layout according to your needs and specifications of the job

2. MAKING A SELECTION DECISION

Definition of selection decision

Regardless of which selection method you use, at the end of the process you still have to make the decision about who you think is the most suitable candidate. The decision on who to appoint should be made after all interviews have been completed. The aim of selection is to assess the suitability of candidates by predicting the extent to which they will be able to carry out a role successfully. It involves deciding on the degree to which the characteristics of applicants in terms of their competencies, experience, qualifications, education and training match the person specification.

The role of selection decision in HRM

Because of the potential costs, the final selection decision must be as valid as possible. This requires systematic consideration of all the relevant information about applicants. It is common to use summary forms and checklists to ensure that all the pertinent information has been included in the evaluation of applicants (Nankervis et al., 2020). The important consideration in costing out selection errors is to calculate not only the direct costs, but also the indirect costs. Poor decisions can incur:

- further recruitment and selection costs
- additional development and orientation costs
- opportunity costs
- loss of competitive advantage
- damage to company brand
- loss of employer of choice status
- reduced internal status
- threatened company viability
- loss of other key staff (Nankervis et al., 2020, p. 245).

Those potential intangible costs are proof that the selection decision process can be very challenging and requires special attention and caution.

The selection decision tools

- Analysing job description and defining the most relevant criteria against which you will measure each candidate
- Preparing and structuring a simple evaluation form incorporating these criteria
- Evaluating the employee’s competencies and skills during the interviewing process

Candidate evaluation form

The candidate evaluation form is a template that can be used to combine the scores on each selection method and arrive at an overall score for an applicant. It is a rating form based on valid selection criteria which can assist the decision-making process and the final decision about employment. The candidate evaluation form is completed by the interviewer to rank the candidate's overall qualifications for the position to which he or she has applied. Under each heading, the interviewer should give the candidate a numerical rating and write specific job-related comments in the space provided.

WHEN TO USE IT

- To maintain a fair and defensible recruiting process
- To evaluate and compare candidate's performance during interviews and other selection methods in a consistent way
- To make a final decision about the employment of the best candidate at the end of the recruiting process

WHY IT IS HELPFUL

The candidate evaluation form based on valid selection criteria will assist the decision-making process. It summarizes all criteria relevant to the job position and enables an assignment of scores based on these criteria individually to all candidates.

WHAT YOU GET

You will get a structured evaluation form with the most relevant criteria for the job position. Using the standardized form, you will be able to evaluate candidates and their performance during interviews or other selecting methods and tests. Based on the total score of a particular candidate, you can make the final decision about employing the best candidate for the job position.

LET'S LOOK AN EXAMPLE

Table 8. An example of candidate evaluation form

Candidate Name:			**Position:**			
Interviewer Name:			**Date:**			
5 - Exceptional 4 - Above Average 3 - Average 2 - Below Average 1 - Unsatisfactory						
Criteria	**5**	**4**	**3**	**2**	**1**	**Comments**
Educational Background: Does the candidate have the appropriate educational qualifications or training for this position?						
Prior Work Experience: Has the candidate acquired similar skills or qualifications through past work experiences?						
Technical Qualifications/Experience: Does the candidate have the technical skills necessary for this position?						
Verbal Communication: Did the candidate demonstrate effective communication skills during the interview?						
Candidate Enthusiasm: Did the candidate show enthusiasm for the position and the company?						
Knowledge of Company: Did the candidate show evidence of having researched the company prior to the interview?						
Teambuilding/Interpersonal Skills: Did the candidate demonstrate, through his or her answers, good teambuilding/interpersonal skills?						
Initiative: Did the candidate demonstrate, through his or her answers, a high degree of initiative?						
Time Management: Did the candidate demonstrate, through his or her answers, good time management skills?						
Customer Service: Did the candidate demonstrate, through his or her answers, a high level of customer service skills/abilities?						
Overall Impression and Recommendation: Final comments and recommendations for proceeding with the candidate.						
Total Score						
References						
Candidate reference checks are positive – Yes/No				Comments		
Final Decision						

Source: Adapted from https://www.shrm.org/resourcesandtools/tools-and-samples/hr-forms/pages/candidate-evaluation-form.aspx and Fáilte Ireland (2013) Recruitment and Selection. Online Business Tools

INSTRUCTIONS

- Prepare a job description and employee profile at the outset of the recruitment process
- Define the most relevant criteria against which you will measure each candidate
- Prepare a simple evaluation form incorporating these criteria
- During each interview take only brief notes on candidate responses
- After each interview complete the evaluation form for the candidate in question while the details are fresh in your mind
- Include any comments to explain each of the ratings, citing behavioural examples
- When you have completed all the interviews compare the evaluation forms to identify the most suitable candidate
- Based on your selection methods and tests, you can adjust the evaluation form with other relevant criteria

TIPS AND LESSONS FROM OTHERS (DEPARTMENT OF EDUCATION – STATE OF VICTORIA, 2019):

- Be consistent in evaluating applicants
- Be prepared by familiarising yourself with the rating scale and behavioural indicators relating to each selection criteria
- Be aware of biases such as:
  - ‘halo’ effect: after one excellent answer, the applicant is seen as a strong applicant overall
  - ‘horn’ effect: after performing poorly against one criterion, the applicant is seen as weak overall
  - ‘central tendency’: favouring middle ratings such as ‘3’ or ‘meets requirements’
- Be aware of attributing:
  - statements about what the team or ‘we’ did as evidence of what the applicant personally did
  - vague assertions as facts, e.g. ‘they were all pleased…’
- Be aware of:
  - allowing stereotypes (e.g. gender, cultural and linguistic background, disability, age) to affect your judgement of an applicant’s strengths and weaknesses
  - the ways in which prior knowledge of an applicant can affect your judgement of their assessment performance

PART 3: MOTIVATION/ PERFORMANCE

The objective of this part is to develop a framework for keeping your employees' motivation at a high level. A motivated employee performs better. Your guidance will take shape in tow steps. The first tool is the **Work Motivation Test**, which is a self-diagnosis of the motivation-level. You will be supported in carrying the test out and evaluating its results. **Continuous Feedback** is simple and easily available tool that helps you the preserve and develop the motivation of your employee by analysing their needs and ensuring an appropriate reaction to them.

1. WORK MOTIVATION TEST

This questionnaire explores what motives are most inspiring in our work and what psychological needs motivate us most in a job.

Each numbered section of this questionnaire contains three statements.

Your task is to rank the statements within each unit according to how they correspond to your opinions and feelings about your job and your behaviour at work.

To the right of each statement, mark the most appropriate statement with a 1, the second most appropriate with a 2 and the least appropriate with a 3.

Some statements assume that you are a leader. If you are not, try to evaluate the statements as if you were a leader.

1	A	When a problem needs to be solved, I like to work alone and take responsibility for the solution alone.	
	B	When I have a problem to solve, I like to work in a team (group) and find a common solution.	
	C	When I have a problem to solve, I like to work in a team (group), but only if I'm leading the group.	
2	A	A leader's job is to set exciting, challenging goals for his or her subordinates.	
	B	The objectives should be set by mutual agreement between the team members.	
	C	It is important to set targets that can be achieved with an average personal capacity.	
3	A	My colleagues would describe me as someone who looks out for others.	
	B	People can say that I can speak well.	
	C	At work, I tend to talk mostly about things related to work and tasks.	
4	A	I enjoy discussions that are problem-solving.	
	B	Sometimes I take the opposite side in a debate because it is in my interest.	
	C	I enjoy discussions that allow me to get to know my colleagues better.	
5	A	I'm happy when people notice that I belong to a collective.	
	B	Belonging to a collective is of no particular importance to me.	
	C	I am happy to be an individual; I have no desire to be seen as part of a collective.	
6	A	I like to get feedback on how well I worked with others in a team.	
	B	I like to get concrete feedback on how well I have done a task.	
	C	I'm the best judge of how well I've done a job; pay rises and promotions are the most important feedback for me.	
7	A	The most important evaluation criterion for a subordinate is the achievement of the goal and the task.	
	B	The most important evaluation criterion for an employee is his or her future development.	
	C	The purpose of the evaluation is to find out what the employee did right and what mistakes they made.	
8	A	Conflict is a tool that can be used to find the best possible solution to a problem.	
	B	Conflict can be very healthy: it encourages people to be diligent.	
	C	Conflict must be controlled; members of a community arguing among themselves are rarely productive.	
9	A	An important factor in any solution is its acceptability to the group that has to implement it.	
	B	If I am convinced that a solution will work, I expect it to be implemented and take responsibility for the consequences.	
	C	If I think a solution will work, I want to implement it; further discussion with community members is usually a waste of time.	

10	A	If an employee makes a mistake, I show them how to correct it.	
	B	If a member of my staff makes a mistake, I discuss the situation with them and we agree to correct it.	
	C	If a member of my staff makes a mistake, I tell them to correct it.	
11	A	Mistakes should be a means for people to learn and thus improve themselves.	
	B	I make mistakes, but as long as I'm right most of the time, I do my job.	
	C	I don't like to make mistakes; I don't make the same mistake twice.	
12	A	With hard work and the right support from management, individuals can overcome most problems.	
	B	Hard work can get you through most problems.	
	C	Strong trust can get you through most problems.	
13	A	I focus more on personal relationships with my peers and my boss than with my subordinates.	
	B	I dedicate time and energy to developing and improving my personal relationships at work.	
	C	I only develop personal relationships at work if they help me to carry out my tasks.	
14	A	"Do not pass people on your way up; you may meet them on your way down."	
	B	"Nothing is as successful as success."	
	C	"No one remembers the name of someone who finished second in a race."	
15	A	If I am right, I will win in the long run.	
	B	If I am strong in my faith, I will win in the long run.	
	C	I try to be patient with people, it pays off in the long run.	
16	A	Workers produce well when their bosses work with them.	
	B	Workers' productivity increases if they know what their job is from the start.	
	C	Workers should aim to reach new heights.	
17	A	I'm happy to get a group of colleagues to do things my way.	
	B	As long as a decision is right, it is not important whether it was an individual or collective decision.	
	C	For a decision to be implemented, it must be agreed by all members of the team responsible for implementing it.	
18	A	I work well when I have a personal relationship with my boss.	
	B	I work well in situations where I am my own boss.	
	C	I work well when I have to meet deadlines.	

Scorecard

Transfer the ranking numbers from the questionnaire to this sheet. Then aggregate the numbers in all three columns and enter the result in the “total” boxes.
The lower the score, the more characteristic you are of the motif, and the higher the score, the less characteristic.

Need for Achievement		Need for Affiliation		Need for Power	
1.a		1.b		1.c	
2.a		2.b		2.c	
3.a		3.b		3.c	
4.a		4.b		4.c	
5.a		5.b		5.c	
6.a		6.b		6.c	
7.a		7.b		7.c	
8.a		8.b		8.c	
9.a		9.b		9.c	
10.a		10.b		10.c	
11.a		11.b		11.c	
12.a		12.b		12.c	
13.a		13.b		13.c	
14.a		14.b		14.c	
15.a		15.b		15.c	
16.a		16.b		16.c	
17.a		17.b		17.c	
18.a		18.b		18.c	
Total:		**Total:**		**Total:**	

WHEN TO USE IT

- To identify people’s different motives for work.
- To modify the performance evaluation considering the motivational needs
- To track employees’ needs
- It can provide input information about new employees and additional information for more efficient training programs.
- Identify the most relevant needs of work.
- Orient an employee to understand their own motivation sources

WHY IT IS HELPFUL

With the work motivation test, you can get more detailed information about the motives of the behaviour of your employees. It helps to create a more realistic performance measurement and understand employees' development and motivation needs. Thus, you can choose more efficiently the external and internal motivators for the employees. The PAA-based test is most often used in business or corporate settings. It has enabled the use of personality tests in employees. Originally dismissed as irrelevant, personality tests became more popular when managers attempted to discover what motivates their employees. Personality tests also enable the manager to learn more about everyone. People require different things from their workplace. Individuals motivated by power may need clear expectations and steps to advance in their careers. Individuals motivated by achievement may need regular opportunities to solve a problem. Individuals motivated by affiliation may need consistent feedback on the job that they are doing.

Implications for Organization

The organisation can coordinate and make adjustments based on the needs of the employees. The adjustments can be made as follows:

- Employees with a high need for achievement: They should be provided with challenging yet attainable goals. Frequent feedback needs to be provided to help them achieve the desired result.
- Employees with a high need for power: They should be provided autonomy to manage things themselves.
- Employees with a high need for affiliation: They should be involved in a team and cooperative environment where they can perform best.

WHAT YOU GET

The work motivation test is an easy-to-use test and easy to adapt to the challenges of the companies. It can be a paper-based test, an Excel sheet, or Google Forms.

LET'S LOOK AT AN EXAMPLE

An employee fills out the questionnaire.
This questionnaire explores what motives are most inspiring in our work and what psychological needs motivate us most in a job.
Each numbered section of this questionnaire contains three statements.
Your task is to rank the statements within each unit according to how they correspond to your opinions and feelings about your job and your behaviour at work.

To the right of each statement, mark the most appropriate statement with a 1, the second most appropriate with a 2 and the least appropriate with a 3. Some statements assume that you are a leader. If you are not, try to evaluate the statements as if you were a leader.

1	A	When a problem needs to be solved, I like to work alone and take responsibility for the solution alone.	1
	B	When I have a problem to solve, I like to work in a team (group) and find a common solution.	2
	C	When I have a problem to solve, I like to work in a team (group), but only if I'm leading the group.	3
2	A	A leader's job is to set exciting, challenging goals for his or her subordinates.	2
	B	The objectives should be set by mutual agreement between the team members.	3
	C	It is important to set targets that can be achieved with an average personal capacity.	1
3	A	My colleagues would describe me as someone who looks out for others.	3
	B	People can say that I can speak well.	2
	C	At work, I tend to talk mostly about things related to work and tasks.	1
4	A	I enjoy discussions that are problem-solving.	1
	B	Sometimes I take the opposite side in a debate because it is in my interest.	2
	C	I enjoy discussions that allow me to get to know my colleagues better.	3
5	A	I'm happy when people notice that I belong to a collective.	3
	B	Belonging to a collective is of no particular importance to me.	2
	C	I am happy to be an individual; I have no desire to be seen as part of a collective.	1
6	A	I like to get feedback on how well I worked with others in a team.	2
	B	I like to get concrete feedback on how well I have done a task.	1
	C	I'm the best judge of how well I've done a job; pay rises and promotions are the most important feedback for me.	3
7	A	The most important evaluation criterion for a subordinate is the achievement of the goal and the task.	1
	B	The most important evaluation criterion for an employee is his or her future development.	3
	C	The purpose of the evaluation is to find out what the employee did right and what mistakes they made.	2
8	A	Conflict is a tool that can be used to find the best possible solution to a problem.	2
	B	Conflict can be very healthy: it encourages people to be diligent.	3
	C	Conflict must be controlled; members of a community arguing among themselves are rarely productive.	1
9	A	An important factor in any solution is its acceptability to the group that has to implement it.	2
	B	If I am convinced that a solution will work, I expect it to be implemented and take responsibility for the consequences.	1
	C	If I think a solution will work, I want to implement it; further discussion with community members is usually a waste of time.	3

10	A	If an employee makes a mistake, I show them how to correct it.	1
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	B	I make mistakes, but as long as I'm right most of the time, I do my job.	3
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12	A	With hard work and the right support from management, individuals can overcome most problems.	3
	B	Hard work can get you through most problems.	2
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13	A	I focus more on personal relationships with my peers and my boss than with my subordinates.	1
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	C	I only develop personal relationships at work if they help me to carry out my tasks.	3
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	C	"No one remembers the name of someone who finished second in a race."	1
15	A	If I am right, I will win in the long run.	2
	B	If I am strong in my faith, I will win in the long run.	1
	C	I try to be patient with people, it pays off in the long run.	3
16	A	Workers produce well when their bosses work with them.	1
	B	Workers' productivity increases if they know what their job is from the start.	3
	C	Workers should aim to reach new heights.	2
17	A	I'm happy to get a group of colleagues to do things my way.	2
	B	As long as a decision is right, it is not important whether it was an individual or collective decision.	3
	C	For a decision to be implemented, it must be agreed by all members of the team responsible for implementing it.	1
18	A	I work well when I have a personal relationship with my boss.	2
	B	I work well in situations where I am my own boss.	1
	C	I work well when I have to meet deadlines.	3

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3.a	3	3.b	2	3.c	1
4.a	1	4.b	2	4.c	3
5.a	3	5.b	2	5.c	1
6.a	2	6.b	1	6.c	3
7.a	1	7.b	3	7.c	2
8.a	2	8.b	3	8.c	1
9.a	2	9.b	1	9.c	3
10.a	3	10.b	1	10.c	2
11.a	2	11.b	1	11.c	3
12.a	1	12.b	2	12.c	3
13.a	2	13.b	1	13.c	3
14.a	3	14.b	1	14.c	2
15.a	2	15.b	3	15.c	1
16.a	1	16.b	3	16.c	2
17.a	2	17.b	1	17.c	3
18.a	1	18.b	2	18.c	3
Total:	**34**	**Total:**	**34**	**Total:**	**40**

INSTRUCTIONS TO EVALUATE THE RESULT

Need for Power

Individuals with a higher need for power are motivated to influence. The motivation to influence others can be a desire to control others or control resources. In an organisational context, the need for power is exercised by managers, leaders, coaches and individuals at the top position in the organisation. For example, managers designate responsibilities and duties to lower-level employees and later evaluate their performance. They influence through their power.

People with a need for power aspire to be in the top position, such as leaders and managers in the company. An individual can succeed or fail to achieve a desired result with power. With power, s/he may or may not be authoritative and influential. Similarly, employees may not cooperate well with the dominant and aggressive behaviour of the leader, which can decline their morale to perform well. But, if the employees share similar needs, they can work under pressure and help themselves and the manager achieve desired results.

Typical behaviour exhibited by individuals:

- High: Do not want to involve in disagreement or expect disagreement, demands loyalty, expect harmony, exercise dominance.
- Low: Enjoys alone time and maintains social distance.

Need for Achievement

Individuals with a higher need for achievements are motivated to perform their best. They like to involve themselves in challenging tasks. The successful completion of those challenging tasks is self-rewarding for them. In addition, they are also risk-takers. Achievement-driven individuals also want to be in charge and take control over the way things are done so that they achieve success. Therefore, they like to work at such places where they have control, or the results are clear and certain.
Entrepreneurs are an example of individuals with a need for achievement. They have the motive to achieve and are dedicated to turning it into a reality. They are limited to working alone and do not prefer to work in a team. Due to this behaviour, they may or may not achieve what they desire.

Typical behaviour exhibited by individuals:

- High: Drive for success, must secure win anyway, desire for credit or benefit.
- Low: Avoids complex responsibility and fears failure.

Need for Affiliation

People with a higher need for affiliation are motivated to work in teams. They are motivated to create affiliation and association and work with social connections. They are friendly and cooperative and value workplace relationships' importance. Since they are accustomed to working with the same people, they fear change and take risks. Therefore, they are less likely to switch jobs. In addition, they are also willing to work under managers or other seniors and learn from them.

However, the shortcoming of people with a higher need for affiliation includes the inability of individuals to work alone. In addition, they have no drive to excel or improve their position. They might limit themselves to what they are required to perform.

Typical behaviour exhibited by individuals:

- High: Friendliness, cooperativeness, desires control of resources, exaggerates own position.
- Low: Minimizes own position at times, dependent on oneself.

TIPPS AND LESSONS FROM OTHERS

- Discuss the result of the test and the planned actions with the employees
- Choose the internal and external motivators considering the result
  - o Internal motivation means that your motivation to accomplish your goal comes from within you. It is determined by your own values and goals. Sample goal that is internally motivated: *"I will go to work every day so that I can improve as much as possible."*
  - o External motivation means that your motivation to attain your goal comes from a source outside yourself. Sample goal that is externally motivated: *"I will apply for extra work so that I can earn more to pay for luxury travel."*

2. CONTINUOUS FEEDBACK

Continuous feedback: Continuous feedback is a simple and cheap tool that promote employee growth and progress. It may contribute to increase productivity at individual, team or organisational level and improve the culture of dialogue between the social actors within the organisation. The concrete technique of continuous feedback may vary in different companies and contexts. In summing up, continuous feedback is any feedback that is delivered on an ongoing basis. In some companies, continuous feedback takes the form of structured review, for other organisations it means an entirely informal system with no scheduled appraisal. The adjective 'continuous' is a subjective term by its nature and its frequency is heavily depending on the attitudes and needs of the social actors involved. Accordingly, continuous feedback can take place with short intervals such as weekly, fortnightly or monthly.

There are several possible categorisations of the different types of feedback, e.g. formal/informal; managerial/peer-to-peer, etc. From a functional perspective we may make a distinction between:

Reinforcing feedback (or positive feedback): it is given when we want to sustain a certain positive behaviour. This type of feedback verbally strengthens the positive effects of someone's actions.

Redirecting feedback (or constructive feedback): it is given if we want to make changes in someone's behaviour. In doing so, the feedback giver suggests someone to stop doing X and start doing Y (e.g., start speaking up more at meetings).

WHEN TO USE IT

- To advance performance at individual, group and organisational level
- To build a feedback culture
- To improve continuous dialogue between the social actors
- To detect skill deficits and establish development plans
- It can be used in any situations, it does not depend on previous experiences or actions
- It can be used continuously; its frequency is flexible according to the actual needs

WHY IT IS HELPFUL

By continuous feedback managers and employees will be having regular dialogue to discuss performance, progress and possibilities for improvement. Because of its frequency, continuous feedback eliminates the long time period of the traditional annual review. On the contrary, continuous feedback supports employees adjust and managers help employees in that. Among others:

- It facilitates personal growth: employees can take active role in and responsibility for setting and discussing personal goals.
- It ensures real-time understanding: it helps addressing issues and signal before they become problems. As employees routinely receive information on their performance, they will be aware what they do well and where they can improve.
- It contributes to employee engagement: as manager-employee relationship is an important prerequisite of engagement, having conversations on development may improve engagement.
- It improves the quality of human relationships: by its vulnerable nature, it contributes to openness to others' perspectives and may strengthen psychological safety of all parties being involved into the process.
- Improves feedback culture: as a consequence, less conflict are predictable and it may improve organisational justice.

WHAT YOU GET

The continuous feedback process can bring several results. If it is made in written form, you will get a document, that can serve as a starting point for further actions, being behavioural changes or developmental activities. If it is takes place verbally, it still has its value in contributing to the factors, listed above. Being aware of the various performance dimensions, you can manage the skill deficits of your company effectively, that creates an opportunity for promoting learning and development. In addition, this information is an excellent basis for any other HRM activities.

LET'S LOOK AN EXAMPLE

Here you can find some concrete examples for effective language use in making continuous feedback.

Examples for reinforcing feedback:

- *"I think you did a great job when you did [x]. It showed that you had [y]."*
- *"I can see you're having a positive impact on [x]."*
- *"I really appreciate your [y] and the work you're contributing to [x]."*
- *"Something I really appreciate about you is your aptitude for problem-solving."*
- *"I think you did a great job when you ran the all-hands meeting. It showed that you are capable of getting people to work together and communicate effectively. I admire your communication skills."*
- *"One of your most impactful moments was how you handled Project X. You showed the power of user testing in shaping a feature roadmap. Your efforts increased the likelihood that we satisfy and delight our users. I'd love to see you do more of this."*
- *"I can always count on you to..."*
- *"You are a dependable employee who meets all deadlines."*
- *"Your customer service is excellent. You make everyone feel welcome and comfortable, no matter how busy things get."*
- *"The accounting work that you do for our team helps us out in the long run."*
- *"I appreciate your helpfulness when it comes to training new employees. You always seem willing to take some time out of your day, even though you're busy with other tasks, to show them how we do things here."*
- *"I can always count on you when I need something done immediately."*
- *"Your communication skills are exceptional, and I appreciate the way you always get your point across clearly."*
- *"You are always willing to lend an ear if someone needs help or has a question about something. You're great at being the go-to person when people need advice."*
- *"I appreciate your ability to anticipate our customers' needs."*

Examples for redirecting feedback:

- *"I'd like to give you some feedback, is now a good time?"*
- *"Can we talk about... What do you think worked, and what didn't?"*
- *"Do you have a moment to catch up about how X went?"*
- *"Can we debrief on X?"*
- *"This is difficult for me to say..."*
- *"You seem to struggle with following the company's processes. I would like to see you get better at staying on top of what needs to be done and getting it done on time."*
- *"I'm concerned that your work quality has slipped lately. You're still meeting deadlines, but some of your work seems rushed or incomplete. I want to make sure that you're giving everything the attention it deserves."*
- *"I noticed that you've been getting a lot of customer complaints lately. Is there anything going on? Maybe we can work together and come up with some solutions for how things could be better handled in the future?"*
- *"You seem overwhelmed right now, and it's affecting your work quality. I want to help you figure out how we can better distribute the workload so that you're not feeling like this anymore."*

In addition, you as employer/manager may invite employees to give you feedback. Here are some examples, that make your subordinates easier to give feedback.

- *"Being a good manager/boss is important to me, and I could use your help improving. What are your thoughts on how I could better support you?"*
- *"I feel as though I'm not motivating you as well as I could. Would you prefer I… or…?"*
- *"I'm always looking for ways to be a better manager/boss. Know that I'm always happy to hear what is and isn't working for you."*

Sources:
https://lattice.com/library/how-to-create-a-feedback-culture;
https://matterapp.com/blog/peer-review-examples;
https://www.cultureamp.com/blog/employee-feedback-examples;

INSTRUCTIONS

Something essential to note about constructive feedback is that it should be a conversation. It's not about issuing directives but starting with a problem you can solve together. Continuous feedback requires dedicated time and place. Before giving feedback, you must ask yourself:

- Does the employee have a significant impact on co-workers or the company?
- Are you feeling calm and open-minded, rather than stressed or antagonistic?
- Is the employee in a state of being able to hear your feedback (e.g. not going through an emotionally vulnerable situation, etc.)?
- Do you have an exact idea of what you want to say? (Be prepared for these sessions by having a list of key points you want to cover with your peer reviewer—this helps guide the conversation while ensuring no important points are overlooked.)
- Can you give your feedback in a quiet and discrete place?
- Do you have enough time to give feedback and listen to the employees' reactions?

Scenarios that necessitate constructive feedback, with scripts

1. When you're noticing a pattern: If you have a staff member who's constantly making the same mistake, or has a bad work habit, you have to address it with specific examples. Constructive feedback is the perfect way to do so; you have the fact that it's a repeated behaviour to support why you're bringing it up, but you're also not going to continue let them do it, then bring it up months later at their performance review.

Script: "I've noticed that you've been late to the morning meeting several times this month. We totally understand that public transit isn't under your control, but this can be really disruptive to your co-workers. Is there something going on that makes it hard for you to be on time?"

2. For developmental purposes: When you notice a staff member struggling with a skill or unable to execute a task, constructive feedback can help you get to the root of the issue and uncover a solution. Perhaps they were never properly trained, or they just need to feel as though they have permission to make mistakes; whatever it is, offer feedback that can help them tackle that weakness and improve.

Script: "How are you feeling about creating that quarterly report? Is there anything you need my advice on?"

3. To assess yourself: Strong leaders ask for feedback, as well. You can ask a staff member if the way you're managing is helping them, or if it's actually creating more obstacles. This can be a part of a constructive feedback conversation that you're having for another reason, but it can also be its own check in or conversation.

Script: "How have you been feeling about our biweekly one-on-ones? Are you finding them helpful, or are there other things I can do as a manager to better support you?"

4. To manage the workload: Sometimes, a staff member's workload isn't realistic, or they feel strained and unsupported. If you suspect that a staff member is suffering from burnout, have a constructive feedback conversation with them; many people who feel burned out don't know how to bring it up, and doing so will begin to help them reset by figuring out next steps and moving forward.

Script: "How are you feeling about your workload lately? Does it seem manageable to you, or do you feel like you're being spread too thin?"

Since constructive feedback is a conversation, you can't prepare for everything that may come your way during it. Just remember to ask whether your staff member is comfortable receiving feedback, and to keep it behaviour-based. With feedback conversations and a true back-and-forth, you and your staff can grow in your positions, and in the ways you work with one another.

Source: https://lattice.com/library/constructive-feedback-should-always-be-a-discussion

TIPPS AND LESSONS FROM OTHERS

In the followings we summarise the most important things to know on continuous feedback in the form of dos and don’ts.

DOs	DON’Ts
• Be conscious of timing • Be prepared • Provide specific examples • Make feedback actionable (and future-focused when possible) • Make employee feedback a regular process	• Decline discussing problems openly and regularly • Take only extreme behaviour into consideration, whether good or bad, and ignoring all other efforts • Compare people to each other • Give feedback without listening to the employee’s comments • Make evaluations without facts

PART 4: DEVELOPMENT (LEARNING/ADAPTATION/FLEXIBILITY)

The first three part gave you an insight into particular methods on diagnosing skill and training needs, selecting new employees and motivating existing ones. The fourth part is dedicated to link the previous experiences with a future-oriented perspective. Any type of investment in the development of your employees is an investment in the future of your organisation, as well. This part provides you two methods that will help you in facilitating learning in your company. **Mentoring** is a well-known supportive activity aiming at encouraging personal improvement and progress of a less experienced person. Here we give you some simple and relatively easily applicable exercises. **Pre/Post Motorola Reflection** approaches the learning process from the other end as it is designed for the self-evaluation of the effectiveness of the learning process.

1. MENTORING

Description

The word 'mentor' has its roots in Homer's epic poem The Odyssey, where the Greek author presents the character of Mentor as an experienced counsellor and long-time companion of Odysseus. Today, mentoring refers to the process of acting as a mentor, or to a person who supports and encourages the development of another person (called 'mentee'). A mentor is a knowledgeable, trustworthy individual who is eager to share advice regarding leadership, career, professional, and personal growth. A mentor makes every effort in his or her power to inspire, assist, and encourage the mentee. As a result, mentoring encourages career counselling and role modelling, both of which have a big impact on an employee's (and as a consequence on the organisational) progress.

The development and success of an individual's career can be strongly influenced by mentoring connections, which are advantageous for both the mentor and the mentee, and thus the organisation. Mentoring is a tried-and-true method of developing, for example, leadership skills. Indeed, mentorship and the crucial function of growth cannot be separated for it to be effective. The implication of comprehensive instructions mentors find it feasible to make every effort in his/her power to inspire, assist, and encourage the mentee. The process of mentoring includes modelling because the mentor must be able to model the messages and suggestions provided to the mentee.

WHEN TO USE IT

- when a range of cognitive coaching competencies should be demonstrated i.e. stimulating reflection, paraphrasing, and using data to improve common understanding of processes and objectives behind
- when a dynamic relationship is required that leads to the creativity, professional growth and mastery over problem-solving techniques
- when facilitating organizational change by assisting key employees with their personal and professional changes.
- when supporting individual career development, 'opening doors', and explaining organisational politics are required
- when transferring technical expertise and business skills to the individual is in focus

WHY IT IS HELPFUL

The collaborative and helpful element of mentoring is how the mentor and mentee work together. It is a fantastic method for gaining a deeper comprehension of the duties and expectations within the company as well as for learning from the successes of the past (i.e. how to deal with conflicts of interest, how to increase organisational activities and, most certainly, target developmental activities). The mentee's self-confidence and organizational embeddedness will undoubtedly rise when a mentor provides alternative solutions to the challenging professional, ethical, cultural, and leadership problems the mentee experiences.

WHAT YOU GET

On a one-on-one basis, mentoring is a tool that is still highly important for enhancing both managerial abilities and staff development. Researchers and practical (operational) managers agree that mentoring is a useful technique for fostering the transfer of implicit knowledge in the workplace. Additionally, many of the qualities that make a good leader or professional supervisor, also make a successful mentor: these competencies include empathy, active listening abilities, open-ended questions, honesty, and non-judgemental behaviour. All of these will help mentees gain a deeper comprehension of the hidden meanings and information, as well as useful advice on the tasks, epiphanies, and bottleneck circumstances that mentees can encounter at work.

LET'S LOOK AN EXAMPLE

In the followings some practical exercises will be presented in order to support you to build a reliable relationship with potential to thrive your mentee.

Goal-planning session

In order to create a sustainable, meaningful and meaty framework of the whole mentor-mentee relationship, it should have measurable goals. It doesn't imply to set up hard data-based, formal schemes. Goals that are determined and measured on a qualitative basis can also be as appropriate as the quantified ones. You should devote the time necessary to define a clear set of goals at the very beginning of the mentoring process, otherwise it is hardly to realize fruitful progress. Try to support the mentee in leading the way how the goals are developed. It can be helpful to give him/her some inspiring questions if he/she is stalled in creating adequate goals. Some examples:

- *What does success look like to you?*
- *Where do you see yourself in five years?*
- *Which specific goal do you want to achieve?*
- *How do you track the progress of your goal(s)?*
- *Why do you want to reach that goal?*
- *How do you expect to feel after I reach that goal?*
- *What have you done so far?*
- *What's an obstacle you're currently facing?*
- *What are your strengths? What are your weaknesses?*
- *In what areas would you most like support?*
- *What do you hope to gain from our mentoring sessions?*
- *How can I support you in overcoming your challenges?*

Defining mutually accepted goals of the process will help you to make a common understanding of the mentee's current situation and creating a common language that serves as the basis of your cooperation. Importantly, work together to create a timeline for each of the goals you create. Just make sure you and your mentee are realistic regarding what is achievable within the timeframe of your mentoring relationship. There are multiple ways to establish goals, but we recommend you try creating SMART goals. It means that goals should be:

Specific: Goals should be well defined, clear, and unambiguous and you shouldn't be able to misinterpret or confuse it.
Bad example: *"I want to lose weight."*
Good example: *"I want to lose at least 15 kg by the 31st December 2023. I will perform half hour cardio per day and …."*
A specific goal answers questions like *"What needs to be achieved?"*, *"What steps need to be taken to accomplished it?"*.

Measurable: With specific criteria that measure your progress toward the accomplishment of the goal. Typical questions: *"How many/much?"*, *"How do I know if I have reached my goal?"*, *"What is my indicator of progress?"*.

Achievable: Goals should be realistic and achievable. Not reaching goals results in negative emotions: disappointment, frustration, and may lead to a job quit. Relevant questions: *"Do you have the resources and capabilities to achieve the goal? If not, what do you missing?"*, *"Have others done it successfully before?"*.
Bad example: *"I'm never eating chocolate again."*
Good example: *"I will reduce my chocolate consumption to two squares of chocolate per week."*

Relevant: Goals should be relevant to the mentee's values, purposes and ambitions.
Bad example: *"I want to be the sales director."*
Good example: *"I will increase my sales performance at least by 10% within 6 months."*

Time-bound: With a clearly defined timeline, including a starting date and a target date.

Make a record of the mutually accepted goals and check in on them regularly.

Highs and lows
If you want to maintain the mentor-mentee connection on a weakly-basis, it can be useful to ask the mentees to report on the highest and lowest professional points of their week. This method will help you to build a trust-based relation to your mentee and to provide learning-based professional support. Some useful questions:

- What went well? What went wrong?
- What are your feelings concerning your highest/lowest moment?
- What have you learned? What would you change? Why?
- What do you believe others think about the situation/you?

Mood Boards

Creating a mood board together helps visualize mentee's goals. You can collect images, quotes or any other sources of inspiration to express the possible future.

Read a book together

Reading an article or book together is a very good learning opportunity for both the mentor and mentee. You can try to find a professional textbook or monograph that is appropriate for the preliminary fixed learning goals but more unconventional readings (a novel for instance) can be also taken into consideration. In order to be efficient in achieving learning goals, and maintain the dynamics of the conversation, it is worth reading ahead and formulating discussion questions in advance. Some examples:

- *What was your favourite part of the book?*
- *What was your least favourite?*
- *Did you reread any passages? If so, which ones?*
- *What surprised you most about the book?*
- *How did your opinion of the book change as you read it?*
- *If you could ask the author anything, what would it be?*
- *What was your favourite quote from this book and why?*
- *What did you already know about this book's subject before you read this book?*
- *What new things did you learn? What questions do you still have?*
- *What else have you read on this topic?*
- *What do you think about the author's research? Was it easy to see where the author got his or her information? Were the sources credible?*
- *Conveying research in a way that's understandable and enjoyable to read for non-experts can be a challenge. How well do you feel the author did this? What do you think of their writing style?*

Roleplay

Roleplay is a well-established and widely used practice that helps the mentee to gain an external perspective and supports the mentor in expanding his/her knowledge on how the mentee has progressed and what improvements are needed. You should try to make a simple scenario and respect the comforts-level of the mentee. Still, the goal of the roleplay is moving the mentee out of his/her comfort zone. As role play is about how to address a challenging situation to practice skills, a good staring point can be an upcoming interaction that the mentee is uncertain about. During he roleplay you can highlight every aspect of the situation and potential risks can also be identified.

Do a mutual job shadow

Job-shadowing is also an interesting exercise that it also appropriate if you want your mentee expanding his/her perspective. The practice itself is quite simple: have your mentee follow you during your workdays to see the work from your perspective. As a potential result, mentees will respect your job and improve their skills and behaviours that are required in your company. You should be reflexive by preparing with questions you want to be answered and at the end of the process organise a follow-up conversation on what the mentee observed and how these issues can be interpreted.

Plan "Ask Me Anything" Sessions

The aim of the "Ask Me Anything" (AMA) session is to allow the mentee to ask mentor to career- and/or profession-focused questions. These questions can range from the various career stages of the mentor to problematic professional/technical obstacles encountered during his/her career. This exercise will forge the professional relationship between the mentor and the mentee, and the mentee can improve his/her questioning skills and gain experiences on his/her limits.

INSTRUCTIONS

- the goals, objectives, and purposes of the process must be spelled out in unambiguous terms and be integrated with the organizational framework
- both the mentor and the mentee must be aware of and understand their respective roles, obligations, and expectations
- a termination provision must be worked out that allows the mentoring relationship to end if it is not successful (i.e. a get-out clause if parties cannot work together effectively)
- set up a three-stage protocol: (1) What's going on? (The mentee describes the problem or circumstance at hand), (2) What do I need or want? (The mentee goes through the goals only to achieve with the mentor's assistance.) and (3) How do I get what I need or want? (The mentor assists the mentee in considering all of their options and creating an action plan.)

A vibrant mentor-mentee relationship rests on good questions that help to make a better understanding of the current situation and facilitate intellectual progress in the mentoring process. Here are some thematic examples of questions that should be modified according to the specificities of the concrete mentoring process you and your mentee are being involved in.

Getting to know each other

- Where are you from originally?
- What was your educational experience like? What led you to choose your degree?
- What is your professional experience? Please tell me your 'work history'!
- What do you love to do outside of work?
- What inspires you?
- Are there any types of jobs or areas of work that you definitely would not like to do or have no interest in?

Establishing expectations

- What skills or knowledge do you hope to gain from this experience?
- What can I do to make this a positive experience for you?

Goal setting/ Personal growth

- What are your short-term/long-term goals?
- What is the motivation behind your goals? Why are they important to you?
- What skills do you want to develop?
- If you could go back in time, would you choose a different career?
- Who were the most important people that you met, and why? Do you have any role models you look up to or people you admire?

Motivation and habits/Values

- What do you think will be the most challenging for you?
- What do you think will be the most rewarding for you?
- What are you the most worried about/afraid of?
- What are your core values? Where do you see these values in your life?
- What habits have you developed that help you be successful?
- Do you have any habits that hinder your success?
- What will you do differently tomorrow to cope the challenges?
- How can I support you in overcoming your challenges?

Strengths and Weaknesses

- What do you consider to be your strengths?
- In what areas do you think you need to improve?
- What are some of your weaknesses?
- How would you mitigate your weaknesses?
- What can you do to learn more about your strengths and weaknesses?
- Reflection
- Who is someone that you're grateful for in your life? What have they given you?
- How can you incorporate regular reflection into your routine?
- What have you learned from this mentorship experience?
- What changes will you make based on this mentorship experience?

TIPS AND LEARNING POINTS FROM OTHERS

- Empathy, curiosity, genuineness, and the capacity for connection and trust-building are some of the qualities that make a good mentor. According to research, these matter more than any potential professional qualities a mentor may possess.
- The very basis of successful mentoring partnerships is trust.
- The information shared during a mentoring relationship, both personal and professional, may be private. Unless the mentor and the mentee agree differently, it is assumed that neither party will reveal this information to anybody else.

2. PRE/POST MOTORLA REFLECTION

What is POST-MOTOROLA MODEL?

Motorola is a simple reporting framework to capture and learn from the learning objectives of projects, learning opportunities. Motorola is designed to help the preparer analyse what has been learned and communicate it to coaches and team members in a short summary format. The Pre-Motorola is prepared before the project starts and the Post-Motorola afterwards. Both have their own structure and contain some basic questions. Motorola reports (Pre- and Post-Motorola) are made before and after every project or learning occasions. These tools develop the involved person's team/group learning and personal learning skills, but also help to improve their coaching skills by practicing reflecting and questioning method. The extra element it gives and must be emphasised is time for reflection.

Table 9. – The Pre- and Post-Motorola Frameworks

PRE-MOTOROLA	POST-MOTOROLA
What are our teaching objectives? Who are the stakeholders and what their role? What theoretical knowledge is needed to carry out the task/project? What skills are we trying to develop?	What went well? What went wrong? What did we learn? What will we do better next time? How did this experience help us to achieve our goals/learning process?

Source: Team Academy Finland, own edition.

WHEN TO USE IT

Pre-, and post Motorola are simple reporting framework for setting learning goals for projects and learning from them. In all business situations - e.g. project launches, learning opportunities, some unexpected event, etc. - a Motorola analysis can be done if there is a need to prepare for the event consciously or to get quick feedback afterwards. Pre-Motorola is done before projects and Post-Motorola is done after it.

Both of them have their own framework that consist of few basic questions, See *Table 9*. The motorola analysis can be done individually or in a group. In all cases, however, processing is done through sharing. An honest account helps the audience to identify key factors and the dialogue that emerges helps to work through any stumbling blocks.

WHY IT IS HELPFUL

Reporting and documentation support the learning process of individual members, teams, and the whole community/company. Both the production and sharing of reports facilitates learning and provides opportunities for individual experiences to be expressed. When a project is completed, at the end of a learning cycle, participants prepare a report analysing their own performance, learning, successes, and failures and outlining the improvements they need to make.

The framework is also needed because a long, page-long analysis may not be able to convey the most important lessons. A simple scheme can be used by any individual with self-awareness and self-criticism. The table can be easily interpreted by anyone, who can ask questions, if necessary, thereby developing leadership skills and initiating dialogue.
It is also useful because it helps to develop dialogues and the emergence of explicit knowledge.

WHAT YOU GET

First and foremost, it allows for structured thinking. An easy to understand and interpret output is produced after the analysis, which either guides and prepares you for the challenge ahead or gives you structured feedback on what has happened. The purpose of it is to analyse things learnt and to communicate them as a short summary to other participants within the process.

LET'S LOOK AN EXAMPLE

Thana Bos is a Dutch designer, who studies at Team Academy Amsterdam since 2020. She is an independent self-thought designer, life-long student, and entrepreneur. She considers herself a creative problem solver. Her specialities are logo design, Brand Identity Design, User Interface, Business Strategy and Illustration (**https://www.tbosdesign.com/about**). During her studies at Team Academy Amsterdam, she had to compel several 'customer visits' (an occasion or business event that contributes to the success of the entrepreneurship). In the followings we will share her experiences, available at her Studylib profile **(https://studylib.net/profile/501303)**.

She had a one-to-one meeting and interview with Ryan Spencer, who is an entrepreneur with and organic approach to his work. Currently he is involved into yin-advice, through which him and his wife help people understand the origins and coherence of their choices, develop a personal compass and acquire the knowledge and energy to align behaviours. Thana prepare as well as a pre-, and a post Motorola analysis in order to be well-prepared and reflective.

Pre-Motorola analysis

Table 10. – A well-prepared Pre-Motorola analyses

What are the learning goals for this interview?	What is the customer(stakeholder) role in this visit/project?
• How do you know that you're heading in the right direction? • How do you find opportunities to add value to people? • What do you think are great opportunities in this current time? • How have you found people to work with? How do you deal with working with people? • What do you think makes an entrepreneur successful? • How do you put dreams into action? Where do you start? • How have you managed to balance your professional and private life? • How do you find meaningful and useful connections and surround yourself with the right people? • What personal advice would you give me? How can I grow to the next level?	• Hoping that he can offer me some guidance and advice as to moving forward with my entrepreneurial career. • Ryan as a very valuable connection whom I can learn a lot from over the years to come • can connect on a deeper level and possibly collaborate or help each other out • Ryan's role from my perspective is to offer advice, listen carefully to my questions and where I am currently at in my development, and to discuss how we could possibly collaborate.
What skills will you train during the visit?	**How does this visit help you to reach your goals?**
• Be as open and honest as possible. • Asking relevant questions, stating my opinions, and asking for input will be key to making this conversation relevant and useful • keeping things light-hearted, while asking questions. • Providing my put will therefore be key.	• The hope is that this conversation will give me new insights into the next steps I need to take to reach my goals. • Learning from Ryan's experience and advice will broaden and/or deepen my understanding of entrepreneurship and how to best align your personality to the value you add to the world. • It is a great opportunity for me to surround myself with people whom I can learn from and grow with

Post-Motorola Analysis

After the meeting and interview she just prepared a detailed Post-Motorola analyses to be able to draw the conclusions and do it better and more successful the next time.

Table 11. – A well-prepared post-Motorola analyses

<table>
<tr><th>What went well?</th><th>What went poorly?</th></tr>
<tr><td>

The interaction itself was very natural and engaging.
I was able to gain some insights which advanced me towards my goals
I noticed after the conversation is that it gave me a lot of energy, which is something I do not often experience.
Most of my questions got answered.
We have planned another meeting, and we will look at my work more closely and go from there
Lastly, Ryan seems very open to mentoring me and working together on some of the projects he is involved in.

</td><td>

I got quite nervous before starting the digital call, even though I had talked to Ryan before.
I hope that through voluntary exposure to similar situations, this nervousness will go down over time. Especially when meeting with someone in person, which I need to do more of to get used to

</td></tr>
<tr><th>What did you learn?</th><th>What can you do better next time? How did this visit contribute to your goals?</th></tr>
<tr><td>

Focussing on and aligning your life with what makes you ‘tick’.
Prioritizing things that are likely to be successful by taking into consideration the team/people involved and the market/competition. This is something that cannot be thought; it is learned by doing.
Over the past year, I have realized that I need to work together with other people to achieve my goals. My current struggle point in this journey is finding the right people to work with.

</td><td>

The main lesson learned from this company visit in terms of what I can improve on is that I need to expose myself more often to speaking both 1-on-1 and with groups of people of whom I think highly.
Trust and connections are made in the real world, which is why a crucial part of one’s education is learning to interact properly with people and network effectively.
This company visit with Ryan has been a big step in reaching my entrepreneurial and personal goals by giving me new insights, opportunities, and connections.

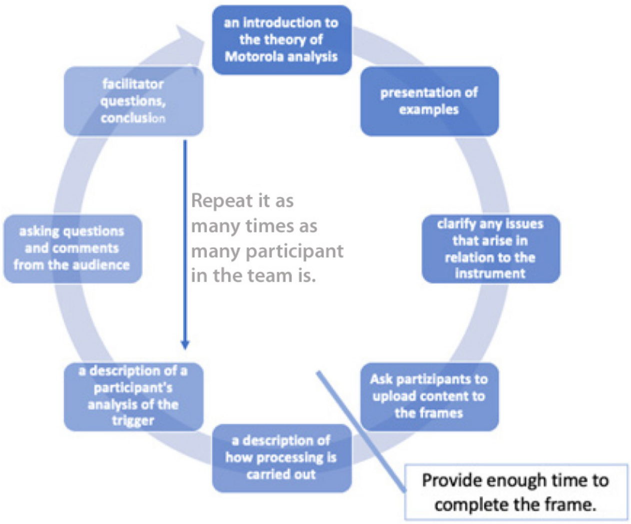
</td></tr>
</table>

INSTRUCTIONS

Using Motorola analysis is very simple.
In each case, the framework should be outlined (drawing and explanation in parallel) and examples should be given. Participants are then asked to complete the framework. Please note that you will be completing it for yourself, but it will be necessary to share the lessons learned with others to ensure the most effective learning.

Please ask the participants to share the Motorola analyses with the other participants in turn. This can be a reading or a summary. As a facilitator/facilitator, take notes for yourself, which will help you to ask questions appropriate to the situation. We always ask the other people present first, whether they have any comments or questions about what has been said. After that, we as the facilitator ask the questions. It is important not to qualify what is said or to express an opinion. Any tensions or disagreements can be resolved through dialogue and questioning techniques will also be meaningful. Care should be taken to ensure that the questions are (1) open-ended; and (2) do not imply an answer, (3) and are not perceived as qualifying by the person sharing the reflection. During the dialogue, make sure that everyone has the opportunity to be involved and that there are no participants who are more vocal than others. Having reviewed the Motorola we know, let's move on to the next participant. Repeat the process until each participant has shared their collection.

Figure 3. – Management of Motorola processes



Source: Own edition.

TIPS AND LEARNING POINTS FROM OTHERS

- It is important to explain the framework to the participants in advance if this method is to be used.
- In any case, Pre-Motorola analysis is part of the preparation and helps both in target training and in establishing and maintaining trajectories.
- In that case, if a Post-Motorola analysis is requested, it is advisable to explain the framework in advance. Knowing the frames will help you to monitor yourself better.
- It is necessary to draw the attention of the participants to the fact that, although the Motorola analysis is for their own use, it will be a sharing circle, so please be careful and be sophisticated.
- It is also worth stressing that there is no right or wrong solution for either Post- or, Pre-Motorola analyses. As they are all about the author, they are subjective. It is also important to emphasise that there is no requirement to meet any expectations, no minimum number of factors to be entered, no expectation that there should be equal numbers or lengths of entries for each set of factors.
- In order for a Motorola analysis to work and lessons to be learned, it is necessary to share honestly the feelings, insights and conclusions of its author. At the same time, it is also worthwhile to draw attention to the need to separate the maker's (1) sensory signals, (2) emotions, and (3) conclusions. From this point of view, the method is very useful, as it introduces the basics of coaching approved leadership.
- It is worth also to mention to the model makers that it is important to have an appropriate level of self-awareness and self-criticism, as well as a critical approach.
- The preparation of an analysis depends on the skills and experience of the preparer. In some cases, 10-12 minutes are sufficient for a detailed elaboration, in other cases, for longer processes or in the case of an advanced process of self-awareness of the subject, it may take up to half an hour. The time required for processing can also vary over a wide time range, with at least 7-10 minutes per person.

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APPENDIX

In the Appendix those questionnaires/forms are collected that were presented in the core text as examples to the various exercises/tools. If you want to use them in managing the daily HRM or HRD praxis in your company, you can freely adapt them to you goals or just print them out.

1. TRAINING NEEDS DIAGNOSTIC TOOL

A. Socio-professional characterization

1. Gender: Male ☐ Feminine ☐
2. Birthdate: Year _____ Month ______ Day ______
3.A dress (District): ____
4. Academic Qualifications (Check only the maximum degree you have).

Less than 9th grade ☐	Graduate, without conclude ☐	PhD ☐
Less than high school ☐	Graduate **Course** ____________________ ☐	Other: ______________
high school ☐	Master degree ________________________ ☐	

5. Profession (Identify the profession in full). If you are unemployed, identify your last profession. If you belong to a military force, refer to your specialty, regardless of the rank you occupy.

6. **Professional status** (Check your current situation)

Unemployed	☐
Self-employed ____________________ Sector of activity: (e.g. Education, Health)	☐
Employee	☐
Inactive **(e.g. Retirees)** **Your survey ended here.** **Thank you for your participation!**	☐
Employee Sector of activity of the company where you work: (e.g. Education, Health) ____________________ Direction/ Department/ Service to which it is assigned: (eg Commercial, Administrative) ____________________ Number of employees in the company:	☐ ☐
(approximate, if you don't know exactly):	☐

Analysis of the relationship between professional activities / training

1. Describe your main functions or activities.
   If you are unemployed, use your last job as a reference:

2. Indicate the main difficulties in carrying out the functions or activities mentioned above:

- [ ] Obtain knowledge/skills in some areas
- [ ] Know / better understand the impact of my functions on other functional areas of the company
- [ ] Articulate the different tasks / functions in the times that are needed (Time management difficulties)
- [ ] Articulation of the exercise of these functions with other elements of the organization (Difficulties in Personnel Management/Interpersonal Relationship/Teamwork) Having the necessary means and mechanisms for the proper execution of tasks (Difficulties in physical and methodological resources)
- [ ] Others:

3. Of the difficulties mentioned in the previous point, which ones do you think could be overcome with training? (If you did not complete the previous question, do not complete this question)

4. Identify your professional goals within 1 to 2 years:

- [ ] Get a job
- [ ] Increase Knowledge
- [ ] Achieve professional stability
- [ ] Progress professionally
- [ ] Change Job
- [ ] Others (s):

5. In order to achieve the objectives set out in the previous point, what specific preparation, knowledge and/or skills do you lack or need?

6. Tick a maximum of three (3) reasons why, in your specific case, you could attend vocational training courses:

Grow professionally	☐
Perform my duties more competently and confidently	☐
Be more protected against unemployment phenomena	☐
Thinking about changing jobs/profession	☐
Contribute to the development of the company where I work Think about building my own job	☐
Develop entrepreneurial and innovative skills capable of contributing to the development of the organization where I work	☐
Entering or re-entering the labour market	☐
Other(s):	☐

C. Characterizationof trainingoperationalizatin indicators

1. Mark with a cross (X) the interest in carrying out these trainings, regardless of the actual conditions for being able to do so (availability of time, financial availability, etc.). Mark a maximum of 3 options as "**Very Interested**"

AREA OF STUDY	Very interestedM	edium interested	Low Interested/ No interested
Innovation and Entrepreneurship			
Emotional Intelligence			
Productivity			
People Management			
Conflict Management			
Digital Marketing			
Creative problem solving			
Time Management			
Others			

1.2 For the three (3) areas that you marked as "Very Interesting" in the previous point, specify the main skills/knowledge you need to acquire/improve.

C. Availability to attend training

7. Considering your actual availabilities, place a cross (X) in each column, in the training operationalization options that would be most advantageous to you.

NUMBER OF HOURS PERDAY	Day period	Day of weekT	ype of Training
Less than 2 hours	MorningM ☐	ondayP ☐	resential ☐
2 to 3 hours	AfternoonT ☐	uesday ☐	E-learning (distance) ☐
3 to 4 hours	NightW ☐	ednesday ☐	B-learning (mixed training: face -to-face and distance) ☐
4 to 5 hours	IndifferentT ☐	hursdayS ☐	eminar ☐
5 to 6 hours		Friday ☐	Indifferent ☐
6 to 7 hours		Saturday ☐	
Indifferent		Sunday ☐	

Suggestions

Within the scope of this work, if you wish, you can express your opinion here on any aspect that you consider relevant and that was not addressed.

Thanks for your collaboration!

2. CANDIDATE EVALUATION FORM

Candidate Name:P				**osition:**		
Interviewer Name:				**Date:**		
5 - Exceptional 4 - Above Average 3 - Average 2 - Below Average 1 - Unsatisfactory						
Criteria	**54**		**32**		**1C**	**omments**
Educational Background: Does the candidate have the appropriate educational qualifications or training for this position?						
Prior Work Experience: Has the candidate acquired similar skills or qualifications through past work experiences?						
Technical Qualifications/Experience: Does the candidate have the technical skills necessary for this position?						
Verbal Communication: Did the candidate demonstrate effective communication skills during the interview?						
Candidate Enthusiasm: Did the candidate show enthusiasm for the position and the company?						
Knowledge of Company: Did the candidate show evidence of having researched the company prior to the interview?						
Teambuilding/Interpersonal Skills: Did the candidate demonstrate, through his or her answers, good teambuilding/interpersonal skills?						
Initiative: Did the candidate demonstrate, through his or her answers, a high degree of initiative?						
Time Management: Did the candidate demonstrate, through his or her answers, good time management skills?						
Customer Service: Did the candidate demonstrate, through his or her answers, a high level of customer service skills/abilities?						
Overall Impression and Recommendation: Final comments and recommendations for proceeding with the candidate.						
Total Score						
References						
Candidate reference checks are positive – Yes/No				Comments		
Final Decision						

Source: Adapted from https://www.shrm.org/resourcesandtools/tools-and-samples/hr-forms/pages/candidate-evaluation-form.aspx and Fáilte Ireland (2013) Recruitment and Selection. Online Business Tools

3. WORK MOTIVATION TEST

1	A	When a problem needs to be solved, I like to work alone and take responsibility for the solution alone.	
	B	When I have a problem to solve, I like to work in a team (group) and find a common solution.	
	C	When I have a problem to solve, I like to work in a team (group), but only if I'm leading the group.	
2	A	A leader's job is to set exciting, challenging goals for his or her subordinates.	
	B	The objectives should be set by mutual agreement between the team members.	
	C	It is important to set targets that can be achieved with an average personal capacity.	
3	A	My colleagues would describe me as someone who looks out for others.	
	B	People can say that I can speak well.	
	C	At work, I tend to talk mostly about things related to work and tasks.	
4	A	I enjoy discussions that are problem-solving.	
	B	Sometimes I take the opposite side in a debate because it is in my interest.	
	C	I enjoy discussions that allow me to get to know my colleagues better.	
5	A	I'm happy when people notice that I belong to a collective.	
	B	Belonging to a collective is of no particular importance to me.	
	C	I am happy to be an individual; I have no desire to be seen as part of a collective.	
6	A	I like to get feedback on how well I worked with others in a team.	
	B	I like to get concrete feedback on how well I have done a task.	
	C	I'm the best judge of how well I've done a job; pay rises and promotions are the most important feedback for me.	
7	A	The most important evaluation criterion for a subordinate is the achievement of the goal and the task.	
	B	The most important evaluation criterion for an employee is his or her future development.	
	C	The purpose of the evaluation is to find out what the employee did right and what mistakes they made.	
8	A	Conflict is a tool that can be used to find the best possible solution to a problem.	
	B	Conflict can be very healthy: it encourages people to be diligent.	
	C	Conflict must be controlled; members of a community arguing among themselves are rarely productive.	
9	A	An important factor in any solution is its acceptability to the group that has to implement it.	
	B	If I am convinced that a solution will work, I expect it to be implemented and take responsibility for the consequences.	
	C	If I think a solution will work, I want to implement it; further discussion with community members is usually a waste of time.	

10	A	If an employee makes a mistake, I show them how to correct it.	
	B	If a member of my staff makes a mistake, I discuss the situation with them and we agree to correct it.	
	C	If a member of my staff makes a mistake, I tell them to correct it.	
11	A	Mistakes should be a means for people to learn and thus improve themselves.	
	B	I make mistakes, but as long as I'm right most of the time, I do my job.	
	C	I don't like to make mistakes; I don't make the same mistake twice.	
12	A	With hard work and the right support from management, individuals can overcome most problems.	
	B	Hard work can get you through most problems.	
	C	Strong trust can get you through most problems.	
13	A	I focus more on personal relationships with my peers and my boss than with my subordinates.	
	B	I dedicate time and energy to developing and improving my personal relationships at work.	
	C	I only develop personal relationships at work if they help me to carry out my tasks.	
14	A	"Do not pass people on your way up; you may meet them on your way down."	
	B	"Nothing is as successful as success."	
	C	"No one remembers the name of someone who finished second in a race."	
15	A	If I am right, I will win in the long run.	
	B	If I am strong in my faith, I will win in the long run.	
	C	I try to be patient with people, it pays off in the long run.	
16	A	Workers produce well when their bosses work with them.	
	B	Workers' productivity increases if they know what their job is from the start.	
	C	Workers should aim to reach new heights.	
17	A	I'm happy to get a group of colleagues to do things my way.	
	B	As long as a decision is right, it is not important whether it was an individual or collective decision.	
	C	For a decision to be implemented, it must be agreed by all members of the team responsible for implementing it.	
18	A	I work well when I have a personal relationship with my boss.	
	B	I work well in situations where I am my own boss.	
	C	I work well when I have to meet deadlines.	

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Scorecard

Transfer the ranking numbers from the questionnaire to this sheet. Then aggregate the numbers in all three columns and enter the result in the “total” boxes.
The lower the score, the more characteristic you are of the motif, and the higher the score, the less characteristic.

Need for Achievement		Need for Affiliation		Need for Power	
1.a1		.b		1.c	
2.a2		.b		2.c	
3.a3		.b		3.c	
4.a4		.b		4.c	
5.a5		.b		5.c	
6.a6		.b		6.c	
7.a7		.b		7.c	
8.a8		.b		8.c	
9.a9		.b		9.c	
10.a		10.b		10.c	
11.a		11.b		11.c	
12.a		12.b		12.c	
13.a		13.b		13.c	
14.a		14.b		14.c	
15.a		15.b		15.c	
16.a		16.b		16.c	
17.a		17.b		17.c	
18.a		18.b		18.c	
Total:		**Total:**		**Total:**	

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LEAD PROJECT HANDBOOK 2023

ERASMUS+ KA220-VET - Cooperation Partnerships
2021-1-HU01-KA220-VET-000033052
LEAD – LEarning And Development in micro- and small enterprises

Co-funded by
the European Union

This project has been funded with support from the European Commission.