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**FACULTY OF AGRARIAN MANAGEMENT**

**PRODUCTION AND INVESTMENT MANAGEMENT  
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**SELF-MANAGEMENT**

for the students of the specialty 073 “Management”

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The manual summarizes scientific approaches to defining self-management, identifies criteria for effective self-management, defines value orientations and self-development of a manager's personality, professional growth, and planning in a manager's business career. The training manual contains the theoretical and methodological basis of the organization of managerial work and the formation of the qualities of an effective manager, as well as the development of his/her potential. The manual will be useful for students, professors of universities, as well as heads of organizations.

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### **Educational edition**

Educational Manual

for the students of the specialties 073 “Management”

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## INTRODUCTION

Self-management is an essential skill for empowering both individual and organizational success in the 21st century. The contributors of this book have got a lot of experience in raising and educating managers and in teaching different managerial disciplines. This manual covers numerous dimensions of self-management, in particular planning, organization of self-management activity, development of organizational potential, leadership development, etc.

Self-management is the ability to manage one's personal workflow and productivity in the workplace without reliance on a supervisor. Developing and practicing self-management skills can help people to improve their workplace performance and positively impact their career development.

Self-management skills are crucial for getting ahead both personally and professionally. Some key attributes of employees with solid self-management include:

- Reliability, i.e. to be able to fulfill self-manage tasks. This will show your supervisor that you are a reliable employee who can complete complex tasks with little or no supervision.

- Multi-tasking: to be able to combine different tasks simultaneously without becoming overwhelmed or stressed.

- Time management: to possess good time management skills, allowing you to complete tasks efficiently and prevent procrastination.

- Advancement: to be able to be promoted thanks to solid self-management skills.

Generally, these are self-management skills, which allow a person to maximize productivity, improve workplace performance and efficiently achieve professional goals. Improving self-management skills can help to increase employability and better manage your career path.

## **Topic 1. Development of self-management as a science**



- 1. The essence, functions and goals of self-management.**
- 2. Career effectiveness.**

### **1. The essence, functions and goals of self-management**

Theoretical foundations of self-management. The concept of "self-management" entered the scientific literature not a long time ago. The beginning of the emergence of this trend is considered to be the mid-90s. However, despite its young age, the new direction of management is quite popular. Increased interest in the problem of self-management is not accidental, it is caused by the objective situation in the field of management and planning.

Self-management is the art of managing oneself, one's time, one's life, consciously making one's career through self-assessment, self-determination, and self-development.

One of the main tasks of every successful manager in today's world is continuous individual self-development precisely because organizations as a whole are unable to control this process.

Very important importance has been attached in recent years to the study of the problem of self-management in Ukraine. Along with scientific research, there are a large number of author's courses based on the phenomenon of self-management (for example, the course of lectures by B. Budzan). Such great interest in the problem of self-management,

as in a new way of development, is primarily caused by the crisis situation of the economy and the absence of stagnant traditions of management in our country. In our opinion, self-management is practiced by all people, not only managers, and success in life is achieved only by those who do it more successfully. And even achieving one's own life goals requires self-management from a person. Otherwise, a person will be forced to realize the interests of others in his life and activities. Therefore, self-improvement gradually becomes one of the main factors of survival in market conditions. More and more attention is paid to the creative potential of each employee in progressive companies, which in turn affects the deepening of the psychologization and sociologization of management and the further development of self-management as a new direction of management.

A retrospective analysis of the development of the theory and practice of self-management allows us to identify the following main stages of its formation:

Latent that determines the formation of historical, social, scientific, practical prerequisites for the selection in scientific knowledge of such a field as self-management of life and activities.

Nominative that was in the beginning of the 20th century, when the scientific foundations of management appeared and the importance of the human factor was highlighted.

Institutional that is related to the creation of a number of social structures: laboratories on self-management problems, departments in universities, human institutes.

From a methodological point of view, self-management by its social status is a modern complex scientific discipline of a fundamental and applied nature. Self-management borders on acmeology, the subject of which is the study of objective and subjective factors that contribute and do not contribute to the achievement of the peaks of human development; praxeology, which studies the general theory of human activity. Also, self-management acts as a system-creating factor of the integration of various scientific knowledge (philosophy, biology, sociology, psychology, cybernetics, etc.) necessary for a modern person to solve practical problems.

The prerequisites for the formation and development of the theory and practice of self-management are determined by the fact that:

- ✓ time requires a change in the rules of social development, where a person as the main component of any organization will move into the center of attention of those who are engaged in the organization of personnel management at all levels of management development.

- ✓ a person who manages his formation and development becomes the object of increased attention of the social management system (on the one hand, it is difficult to manipulate him, on the other hand, he himself begins to effectively manage others).

- ✓ according to Ashbey law, the diversity of the social management system should correspond to the diversity of the person (P. Florensky argued that a person is a microcosm, similar to the macrocosm). The lack of a necessary system for managing planetary



processes has a devastating effect on biosocial and spiritual systems, hindering their progressive development.

✓ the rapid development of science and technology, the dynamics of life, unusual types of activities, violations of the ecological balance require matching the functional capabilities of a person, increasing his protective and adaptive characteristics, that is, mastering the methods and technologies of self-management.

✓ change in the social order, personification, autonomy of a person's personal life led to the need to develop recommendations for adaptation to new conditions.

For many people self-management has become a real way of survival, self-affirmation, self-realization, and success.

The advantages of self-management include: performing work with the lowest costs, better organization of work, better work results, less haste and stress, more satisfaction from work, greater work motivation, professional development, less workload, fewer errors in the performance of one's functions, achievement of professional and life goals in the shortest way.

Various technologies are used in self-management:

✓ The situational management technology assumes that the manager makes operational decisions that affect the staff, based on constant observation and analysis of their activities.

✓ The technology of management by results consists in the fact that adjustments in the activity of the subject for the next period are made depending on the achievement of planned results in the past.

✓ The technology of management by goals is close to the past, but it is aimed at achieving not official planned indicators, but personal goals formed on their basis by employees together with their direct managers, considering their individual abilities and capabilities.

✓ Deviation management technology is built on the assumption that the deviations often do not need correction at all; often it is possible to overcome them by the efforts of the performers themselves, and only if they are significant, the intervention and help of the manager is necessary.

The peculiarities of self-management consider such a factor of human activity as biological, which includes the concept of the natural rhythm of work individually for each person and the concept of biorhythms.

The working capacity of each person is subject to certain fluctuations that occur within the framework of the natural rhythm. They usually talk about a "morning person" or a "lark" and an "evening person" or an "owl". The peak of working capacity falls on them at different periods of the day. Each of us can adapt to these fluctuations in our working capacity. It is necessary to study your peculiarities and use these regularities in your daily routine.

In the life of every person there are three different flows of energy: physical rhythm (affects physical strength and willpower); mental rhythm (determines the dynamics of feelings, moods, creative forces); intellectual rhythm (affects mental abilities).

Since the duration of individual periods is different (23, 28 and 33 days), each person always has different, constantly changing combinations of physical, psychological and intellectual state characteristics. Accounting for your individual biorhythmic state allows you to improve your work capacity, taking it into account when drawing up work plans.

The internal path of self-improvement is much more difficult, although it pays many times more. Its results are felt almost immediately if you have found your real, individual, unique path. Here, it is not the external side of well-being that is important, but the state of internal sincere comfort, determination of true goals and desires. Most often, we strive for what is not our own desire, but determined by the desires and goals of the society in which we are.

That is why it is very difficult to achieve the set goals, with great efforts or not at all. We are motivated by some needs, which, in fact, are not ours, but dictated by our relatives, teachers, acquaintances, etc. We move with the flow, not realizing ourselves as a complete unit of the universe and the world. And then we find ourselves immersed in all kinds of problems and troubles.

Therefore, first of all, managers must learn not to identify themselves with others, define the boundaries of their "self", study its weaknesses and strengths. To find one's true will, which is the inner will, is the will of the spirit, the will of thoughts and actions. The person himself has everything he needs to live, develop, improve, and help

himself cope with his problems. Every person is created to be able to help himself.

### **The main purpose and benefits of self-management.**

The main purpose of self-management is to:

- make maximum use of own capabilities;
- consciously manage life, self-determination;
- to face external circumstances at work and in personal life.

Advantages of self-management:

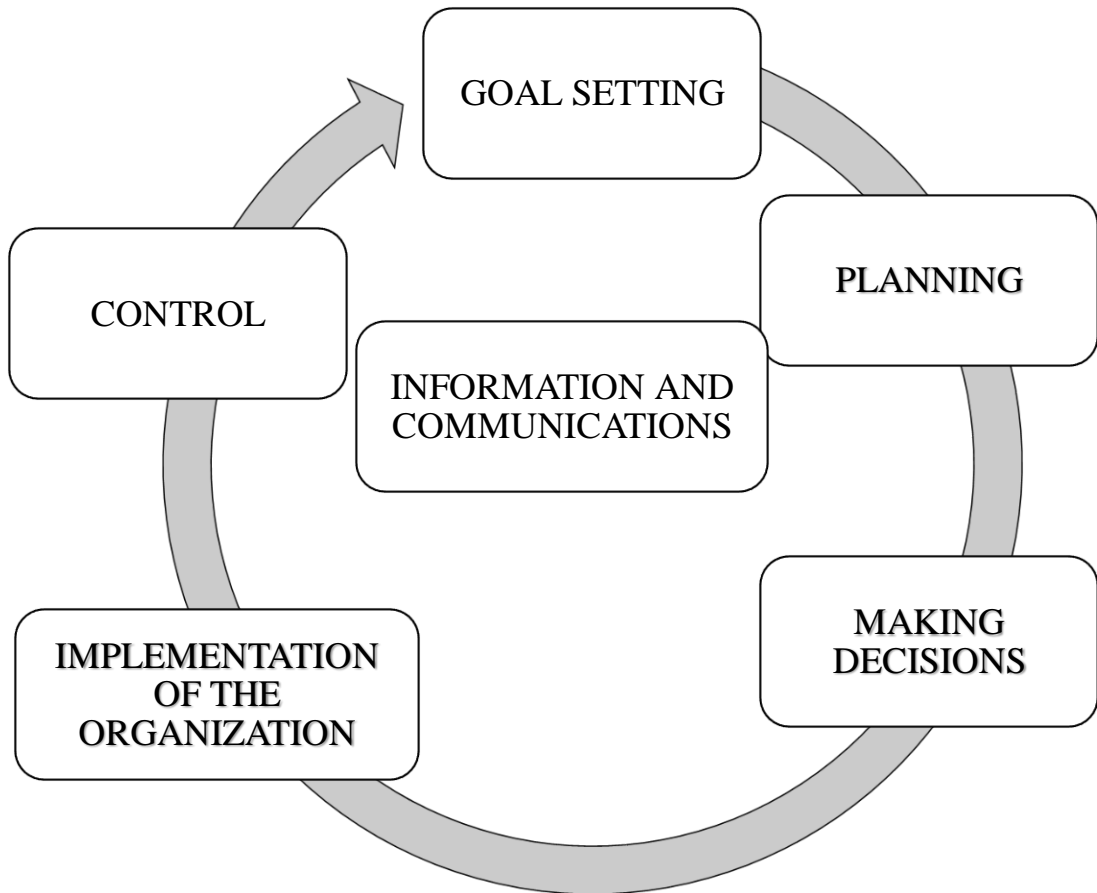
- performance of work with lower costs;
- better work results;
- better organization of work;
- less rush and stress;
- more satisfaction from work;
- great work motivation;
- qualification improvement;
- less workload;
- fewer errors;
- achievement of professional and personal goals in the shortest way.

Functions of self-management are tasks and actions with the help of which many tasks and problems of a manager are solved on a daily basis.

The functions of self-management (according to Zivert's concept) can be graphically displayed as a kind of "circle of rules". With the help

of these functions, many tasks and problems of the manager are solved on a daily basis.

The functions are in a certain dependence among themselves and are carried out in a certain sequence (Fig. 1.1).



**Fig. 1.1. Functions of self-management**

**The following 5 functions are marked in the outer circle:**

- ✓ Goal setting. – Analysis of the formulation of personal goals.
- ✓ Planning. - Development of plans and alternative options for one's activity.
- ✓ Making decisions. - according to the tasks being performed.

✓ Implementation of the organization of the manager's activities - Drawing up a schedule of personal work.

✓ Control – Self-control and control of results. If necessary - adjustment of goals.

✓ Another additional function: Information and communications - it is placed in the inner circle. It seems that all other functions revolve around it, because the search and exchange of information are carried out at all stages of the self-management process. For each function of self-management, working techniques and methods of their implementation, as well as the expected result in the form of time gain, which make up the technique of self-management, have been developed.

## 2. Career effectiveness



Career effectiveness is evaluated both by the person personally and by the organization as a whole. Among the great number of criteria for career effectiveness the most common are: assessment of career performance, career attitude, career adaptation, and career individuality.

The indicator of career performance assessment is salary and position, i.e. the faster the salary grows and the faster promotion takes place, the higher the level of such assessment. Performance evaluation reflects the degree of individual contribution to the achievement of the

main goals of the organization. At the same time, two circumstances can prevent the correct assessment of career-related activities. Firstly, the organization is not always fully able to evaluate the work of the employee, and secondly, the views of the future that the organization associates with a particular person may not coincide with the purpose of this person or his/her abilities.

The attitude towards a career is determined by a person's perception and evaluation of his/her career. The more positive this perception is, the more effective the career is.

Adaptation in the career means the use by employees of the latest knowledge, skills, technologies, which is connected to the changes and development inherent in modern professions. Workers who are not able to adapt to these changes and use them in their activities do not have a chance to make a career.

Individuality in a career is characterized by the degree of a person's awareness of his/her interests, assessments and hopes for the future, the way a person considers his/her own way of life, and the degree of his/her perception of himself/herself as a continuation of past. At the same time, it is important to answer the question: "Who do I want to be and what should I do to become what I want to be"?

### **Career choice**

The most important decision a person makes in his/her life is choosing a career. Scientist John L. Holland explored career choice theory, believing that career choice is an expression of personality and not a random event, that a person's achievement in one or another type

of career depends on the fit between the person's personality and work circumstances.

According to this theory, each person in the process of choosing a career belongs to one of six personality types:

1. Realistic type - people who have technical or mechanical abilities, like to work with objects, machines.

2. Research type - people who like to observe, learn, research, analyze, solve.

3. Artistic type - people who like to work in informal situations, using their abilities, intuition, creativity and imagination.

4. Social type - people who like to work together, helping others.

5. Entrepreneurial type - people who like to influence, manage others to achieve goals.

6. Conventional type - people who like to work with data, have the ability to calculate according to instructions.

### ***Peculiarities of career planning***

#### ***Career strategy planning***

The essence of a career strategy is to organize a career in such a way that the very method of promotion ensures the optimal use of driving mechanisms and weakens the effect of any factors of restraint and resistance.

The main goal of the career strategy is to ensure the stability of the career process, and not to establish a specific social or job status in the strategic period.



Career strategy is the art of weakening or eliminating inhibiting factors to achieve the step-by-step goals of a person's social or job status in a strategic period.

When carrying out individual promotion, the following principles of career strategy are used, which are simultaneously principles of career tactics: continuity; understanding; speed; maneuverability; economy; remarkability.

Career tactics is the art of using all possible tools in the process of implementing a career strategy.

### ***Career planning***

Career is usually of interest to all employees. The main reason for job dissatisfaction is an unsatisfactory promotion policy. In this regard, career planning is one of the important activities of working with specialists. Recently, abroad, there has been an increase in fundamental research on the problem of professional promotion, as well as the number of companies that invest significant funds in solving the problems of professional promotion of young specialists, possessing a stock of theoretical knowledge and potentially capable of occupying managerial positions.

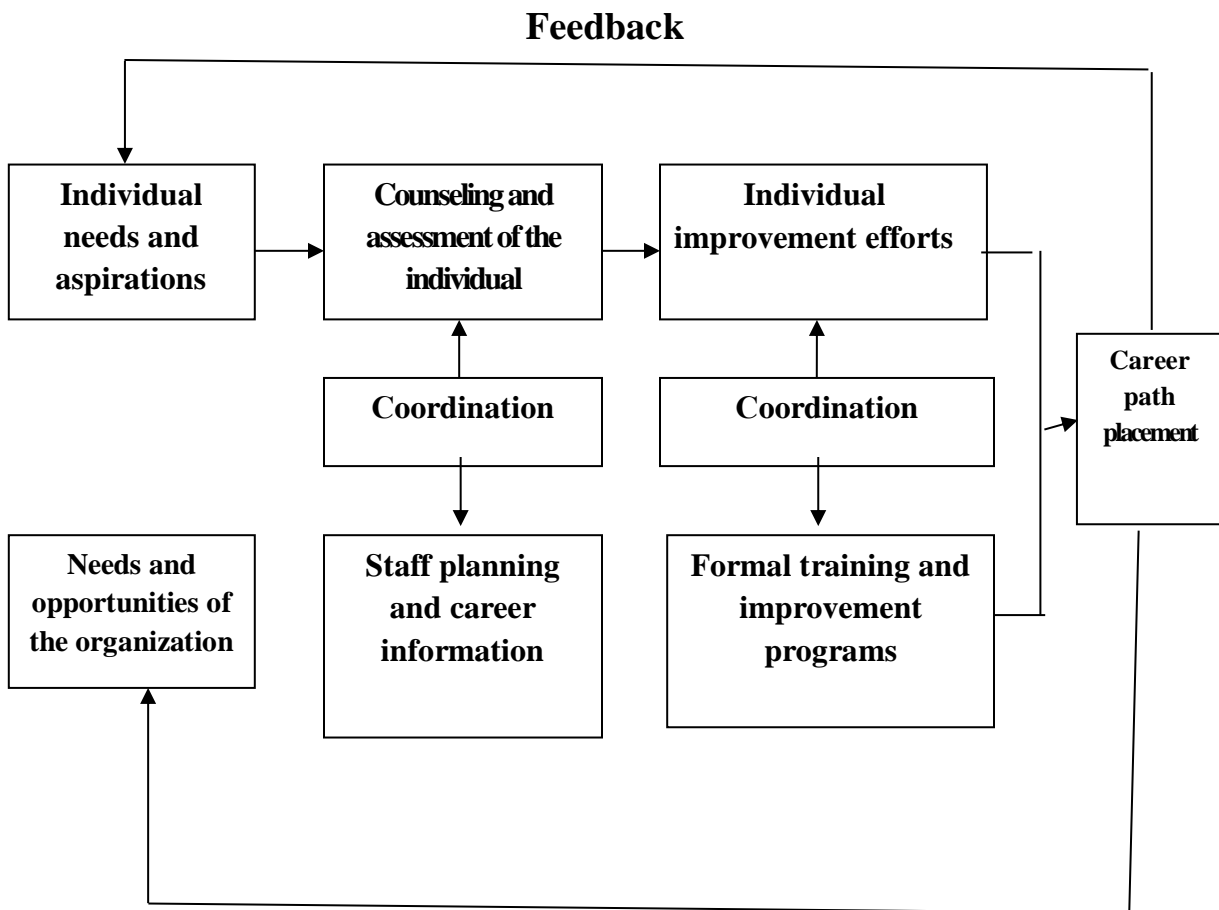
Firms and consultants carry out study of special aspects of the promotion process, namely: motivation of behavior depending on career ambitions, "patronage" relationships, striving for material well-being, features of career growth depending on gender, etc.

Classification of the speed of promotions: rapid take-off; slow but steady growth; slow progress

Practitioners proposed a system of current accounting of young specialists, which contributes to the optimal movement of personnel in the structure of workplaces, considering the needs of production and the wishes of specialists. This system is based on systematic observation of career advancement and allows solving many problems of specialists. An employee's career, as an object of planning and management, has a significant impact on the stability of personnel and motivation to master new professions.

Career planning can be general or specific. General career charts represent a set of several possible directions of professional growth of specialists or a group of specialists, and specific ones represent a clear schedule of filling positions and corresponding training. On the basis of models of business careers of specialists and managers, prospects for the development of management structures, staff schedules, analysis of the dynamics of the growth of needs in managerial personnel, maps of personnel promotion within the company are developed.

Thus, career planning is the alignment of the aspirations of a person making a career with the capabilities of the organization, which are closely related to the career trajectory (the sequence of works through which a person passes, which can lead to the achievement of a personal career goal), which is conditioned by these possibilities. The process of career planning and its trajectory is shown in Fig. 1.2.



**Fig. 1.2. The process of career planning and its trajectory**

In order to implement possible promotions and transfers, many organizations use career development programs. The program indicates the sequence of positions that an employee can hold. This encourages him/her to improve his/her qualifications and, accordingly, take a higher position. It also allows the employee to predict and plan the stages of his/her own promotion. In career planning, employees must identify their aspirations and abilities, which are necessary for a specific career trajectory, and organizations must identify their needs and capabilities, and through staff planning provide information about the careers of their

employees. This is due to the fact that career planning cannot be carried out if information about the career trajectory, availability of vacant positions and job descriptions are not communicated to the employees.

Formal and informal counseling, symposia and seminars are used to coordinate the needs of the employee and the organization.

Informal consultations are held by the personnel department for those who wish to assess their abilities and opportunities, while providing information for further career planning. Such counseling is based on the assessment of the work of employees and, according to such an assessment, there can be determined how employees perform their work and what to expect from them in the future. Formal counseling includes symposia, assessment centers, and career development centers.

An example of an organization that ensures the implementation of formal career planning is the career improvement center of the American firm "Sintex". In this center, a person's strengths and weaknesses are evaluated within eight parameters, which, in the opinion of the "Sintex" company, are most closely related to effective management: problem analysis, communications, structure goals, decision-making and conflict resolution, selection, training and personnel motivation, personnel management, competence and relationships between people, use of time. Based on the scores for these eight positions, the manager determines an individual career with the help of the full-time employees of the center.

Professional career counselors from other organizations are also involved. Each manager's career planning aspirations are discussed in a week-long workshop. The workshop introduces each manager to

simulation situations in which the use of skills in the eight parameters is required. Candidates take part in simulations, after which they review their personal career plans. They then meet with their immediate supervisors to develop career development plans.

Career consultations can be understood as a kind of guiding process that encourages people to review their life and purpose, and then determine how their specific skills and abilities fit that purpose. Most qualified professional career consultants use discussions, tests, inspections, life experiences, and other assessment methods to help people assess themselves and identify their strengths and weaknesses. Practice shows that career planning is most effective for people who have relatively high needs for power, growth and promotion, have a successful record in their previous career, and have the ability to implement their own career plans.

**Conclusion:** studying the theoretical and practical foundations of a managerial career becomes an objective condition for the successful activity of both a person and the organization as a whole.

## **Topic 2. Concepts of self-management. Establishing and implementing personal goals**



- 1. Concepts of self-management**
- 2. The importance of setting goals. Finding goals.**
- 3. Situational analysis. Formulation of goals.**

### **1. Concepts of self-management**

Over the long history of formation and development human practice has tested various approaches and means of self-management. There are different schools of self-management in the world, based on which the following concepts are distinguished:

#### **The concept of saving your time**

It is believed that it was the head of the Institute for the Rational Use of Time in Germany, **Lothar Zivert**, who introduced the concept of "self-management" into scientific terminology. In his book "Your time is in your hands", he considered the problem of modern man's time and derived the basic rules for its rational use. Namely, he singles out two main ways of planning time:

- ✓ The maximum criterion is the time that can be spent for fruitful and successful activities.

✓ The minimum criterion is the achievement of set goals with the least amount of time possible.

According to this concept, self-management is the consistent and purposeful use of proven methods of work in daily practice for optimal, well-thought-out use of one's own time.

L. Zivert considers the main goal of self-management to be the maximum use of managers' own potential, overcoming various external and internal obstacles.

To achieve positive results, the manager must monitor the performance of six main functions, which are implemented in a certain sequence: 1. Setting goals. 2. Planning. 3. Making decisions. 4. Implementation and organization. 5. Control. 6. Information and communication.

For each function, working methods and methods of implementation are offered, which form a technique of self-management.

The basic idea of this concept is saving and rational use of the manager's most valuable capital, i.e. his *own time*.

Despite all the strengths and a lot of practical advice and technology, this concept is far from career problems. It does not rely on knowledge of the essence of business career mechanisms. After all, the time factor is not always a criterion for a successful career.

### ***The concept of overcoming one's limitations***

It should be noted that the authors of this concept, M. Woodcock and D. Francis, did not use the concept of "self-management" at all. The

main emphasis was placed on limitations, which meant factors that restrained the development of an organization, group or individual. Such limitations can arise only if the manager lacks any of the necessary management skills. The goal of every manager should be to fight against his own limitations. The authors highlight the following limitations: inability to manage oneself; vagueness of personal values; vagueness of personal goals; suspended self-development; lack of problem-solving skills; complete or partial lack of a creative approach; inability to influence others; insufficient understanding of the essence of managerial work; inability to manage; inability to teach; poor ability to form a group.

The result of overcoming limitations for the manager will be a successful business career, an increase in professional level and creative potential. However, the main goal of this concept is to prepare a manager for a business career. The negative aspect of this concept is that the specifics of self-management in the process of management and business career are practically not disclosed.

### *The concept of self-management as a set of social technologies*

**V. Karpichev's concept** is of a practical, applied nature. Its author approached the issue of self-management as an interdisciplinary model, which is based on all sciences studied by man. He considers the continuous development of human activity to be the reason for the emergence of self-management. The orientation of self-management is exclusively subjective and is revealed by such concepts as self-management, self-organization, and self-development. In addition, self-management has objective prerequisites, since it comes from human



nature, namely, it corresponds to the biorhythms and genetic program of a person. The author does not limit self-management to internal processes, but provides it with the possibilities to project an external management situation within the limits of the concept. Self-management cannot be represented by a set of fixed rules, it is deeply individual and always situational.

The author attaches great importance to self-management technologies in her work. In creating his concept, he considers the experience of Finnish and Japanese managers; types, methods and rules of self-regulation, management of one's condition; technologies of planning and time structuring. However, many issues remain controversial in this concept. The author does not draw a clear line between management and self-management, attributing to the latter the ability to design the external social environment. In addition, self-management, from Karpichev's point of view, could not be said to be an object of science, since it should be subject to appropriate rules and laws. The author of the concept convincingly stands on the position of deep individuality and situational self-management.

### ***The concept of self-development of a creative personality***

This concept was proposed by **V. Andreiev**. Its main idea lies in the creative nature of the manager's personality. The value of this approach lies in revealing the mechanisms of self-development of a creative person who is already a conscious individual. He is able to carry out activities connected to self-education, self-control, self-realization in one, and most often in several types of creative and managerial activities.

The main emphasis in this concept is placed by the author on the deep individuality of the manager. The author offers 18 main types of a manager's personality: 1) purposeful, but not fanatical; 2) a generator of ideas, but not a spotlight; 3) determined, but not adventurous; 4) flexible, but not a demagogue; 5) demanding, but not rigid; 6) independent, but not self-confident; 7) energetic, but not fussy; 8) authoritative, but not authoritarian; 9) an optimist, but not a clown; 10) a practitioner, but not a pragmatist; 11) principle, but not picky; 12) sociable, but not a demagogue; 13) a leader, but not a careerist; 14) an innovator, but not a technocrat; 15) competitive, but not a collector; 16) intelligent, but not pretending to be intelligent; 17) a revolutionary, but not a populist; 18) a reformer, but not a bureaucrat.

As we can see, all the proposed types are based on positive characteristics. Therefore, it can be concluded that the results of the author's work can be used to improve personal professional qualities, however, as in the previous concepts, the specifics of management are not considered.

### ***The concept of improving one's own culture of business life***

The author of the concept, **A. Khrolenko**, tried to reveal the purpose of self-management through the definition of culture. Self-management is presented here as a set of practical business advice. The author attaches great importance to qualities necessary in the business world, such as the ability to live in harmony with people, the technique of writing letters, introducing conversations. Of course, such skills will create a basis for

promotion, but they do not directly affect the career. This concept also does not consider the regularities of the business career process.

### ***The concept of achieving one's own business success***

The authors of this concept, namely ***Berbel*** and ***Heinz Schwalbe***, oriented it towards career success. Success itself is considered here as the result of activity, the path to which lies through self-knowledge. In addition, the concept presents a number of practical tips, using which the manager will improve personal qualities, reveal his/her capabilities in order to achieve success.

The authors believe that it is important to be able to transform all achievements into success. For many years, the authors of the concept conducted trainings for managers, organized a number of courses for entrepreneurs. Thus, they concluded: in order to formulate a personal concept of achieving business success, the manager needs to answer the following questions:

- ✓ What efforts is the employee willing to make to achieve success?
- ✓ Is he ready to work independently or under guidance?
- ✓ To what extent is he willing to take risks for success?
- ✓ Which path is the most pleasant - an entrepreneurial or an official career?

This concept, in its essence, is most focused on career and success, as a result and the main criterion for career achievement. But at the same time, it does not rely on knowledge about the mechanisms of a business career.

**Conclusion:** each of the described concepts offers a lot of useful tips for self-improvement and self-development, methods and criteria for self-evaluation. However, none of them can be defined as a universal technique, since none of the authors presented above relied on the knowledge of social and psychological mechanisms of implementing a business career.

As research shows, various schools of self-management are a great source of means of human development and achievement of human goals. However, the practice of their use requires considering: national culture, the mentality of the people, psychophysiological features of human development, which are formed in the appropriate ecological and social environment.

The ill-considered use of other people's self-management systems, means of influencing a person as a complex biosocial and spiritual system leads to negative consequences. In this case, deformation of a person as an individual, subject, personality, individuality is possible.

The priority goal of the implementation of these concepts should be the resolution of the contradiction between man's desire for unlimited freedom and the need to organize collective life, which for thousands of years was solved by enslaving man and subordinating his interests to the state. The solution to this contradiction can be found in the form of a compromise between the individual and the state, provided that the latter ensures self-management of the development of each person. Practice proves that the formation and development of self-management is connected with the development of models of self-management, where

the complex of social, psychological and psychophysiological technologies of self-management fits into the social technologies of society (global, informational). And this, in turn, will make it possible to ease social tension, to make optimal decisions for both the person and the bodies of the social management system.

## **2. The importance of setting goals. Finding goals.**

A **goal** is something that is aimed at, that must be accomplished.

Setting **objectives** requires clearly and precisely expressing our explicit and hidden needs, interests, or desires, and orienting our actions to achieve this goal.

**Setting a goal** means looking into the future, consciously carrying out one's actions, concentrating one's forces and activities on what should be achieved.

Thus, **the goal describes the end result.**

Setting goals is an awareness of where we want to go and where we don't want to go, so that we don't end up where other people want to take us.

S. German spoke about it like this: "How much better is it for you to discover and use your strengths and opportunities yourself, rejoice in them and move forward with their help, than to feel like you are in a wheelchair that others are carrying for you."

*It is important to define your goals as early as possible, recognize your opportunities, develop them, use chances and be responsible for your future.*

At the same time, an active and responsible position in life is the key to success, especially for a manager.

The process of setting goals includes three phases:

- 1) the first phase - defining the goal: i.e. - what do I want?
- 2) the second phase - situational analysis: what can I do?
- 3) the third phase - formulation of the goal: what I specifically strive for.

Let's consider the first phase of the goal-setting process - finding goals.

### **Finding goals.**

To determine goals, you need to ask yourself the following questions:

- 1) What goals do you want to achieve in life?
- 2) Do they connect with each other?
- 3) Is there a main, higher goal, or are there defined intermediate goals on the way to the main one?
- 4) Do you know what you yourself can do to achieve the goal (that is, strengths) and what you still need to work on (weaknesses)?

***The main principle of defining and setting goals*** is the clarity of the goal. This is a prerequisite for success in professional and personal life. Some people are so actively involved in the process of performing tasks that they lose sight of the content of their activities: as they say, "you can't see the forest for the trees."

The second most important principle of goal setting is the realistic nature of goals. It is necessary to set real goals, that is, such that can be translated into concrete actions.

Let's consider some examples of goal formulation:

- I want to be happy.
- I want to have good relations with my employees.
- I want to lead a healthier lifestyle.

The given examples of goal formulation indicate the area in which you want to achieve success and the general goal, but they are not specific and not related to time (due date).

Broadly stated goals tend to remain just intentions because they do not indicate what needs to be done in order to succeed.

In order for the goals to be achievable (and not remain only intentions), they should be specified with the help of a question:

"How can these general goals be achieved?", as well as setting specific tasks, clearly defined in time.

***In order for the goal to be achievable, it is necessary when defining the goal:***

1. To formulate specific action-oriented goals, that is, clearly establish a specific end result.
2. To set the time interval.
3. To divide the main goal into sub-goals and tasks for successful progress towards the goal,

Stages of determining personal goals:

1. Development of general ideas about life aspirations.

2. Differentiation in time of life goals.
3. Development of leading ideas in the professional field.
4. Inventory of goals.

**1) The first stage of creating general ideas about life aspirations must be analyzed:**

1. How has your life been so far?
2. What were your biggest successes? What were the failures? In the professional sphere or personal life?
3. How do you imagine your future?
4. What age did you want to live to?
5. What do you want to achieve?
6. What blows or fates of defeat may lie in wait for you?

**2) II stage of determining personal goals – differentiation of life goals in time.**

Here you must realize for yourself what you will strive for in the coming years, as well as what events you will have to reckon with in the next 20 years of your personal timeline. At the same time, it is necessary to take into account people from your immediate environment (children, parents, boss, friends, etc.), their age and your own.

Events that you may have to deal with in the near future:

- *graduation from the institute;*
- *marriage;*
- *birth of a child;*
- *placement of a child in a kindergarten, school,*
- *the child's coming of age, etc.;*



- *retirement of parents;*
- *retirement of the immediate superior;*
- *expiration of payment terms for long-term loans;*
- *release of invested funds, etc.*

**3) Stage III, you should define desired goals for the near and distant future:**

1. long-term goals, that is, what do you want to achieve in this life?
2. medium-term goals (for example, for 5 years)
3. short-term goals - what you want to achieve in the next 12 months.

The IV stage of finding personal goals is an inventory of goals:

To inventory goals, you need to make a list of all your goals and highlight the most important positions - that is, those life goals (personal) and (professional) that you want to achieve.

Determine for yourself from this list the 5 most important items (goals), personal and professional, write them down (written form is mandatory).

### **3. Situational analysis. Formulation of goals.**

A situational analysis allows you to identify your strengths and weaknesses and determine which qualities you can develop and what you still have to work on.

Stages of situational analysis:

1. analysis of the main guiding issues in the personal and professional environment;
2. personal balance of successes and failures;
3. strengths and weaknesses;
4. "goal - means" analysis.

To determine your strengths and weaknesses, you need to balance your successes and failures.

For this, it is necessary to reveal your successes in work and personal life, as well as the abilities, knowledge, and experience that were necessary to achieve these successes.

For instance:

**1. Special knowledge:**

- professional knowledge;
- knowledge of management, self-management;
- special production and economic knowledge;
- erudition;
- contacts and connections.

**2. Personal qualities:**

- physical data, constitution;
- the ability to keep oneself, to always be in shape, activity;
- stamina, sociability;
- the ability to listen, intuition, adaptability, readiness to help, susceptibility to criticism, self-criticism.

**3. Abilities of the manager:**

- penetration force;

- ability to convince;
- ability to distribute responsibilities;
- the ability to stimulate and motivate the work of individuals and teams.

**4. Intellectual abilities:**

- creative potential, logical thinking.

**5. Working techniques:**

- work methods, work organization;
- technique of conducting discussions, negotiations, etc.

***In this way, you make a balance of personal successes, in which you indicate your greatest successes and achievements and those abilities of yours that were necessary for this;***

The next step is to make a personal negative balance, in which you indicate, respectively, your biggest failures, as well as those abilities that you lacked, and how did you overcome them?

You must clearly visualize your weaknesses in order to take steps to overcome your shortcomings.

A famous aphorism says: "To know your weaknesses is to strengthen your strengths", because as soon as you overcome your weakness, it immediately turned into your strength.

To identify strengths and weaknesses, you need to group your strengths and weaknesses and highlight 2-3 most important strengths and weaknesses. Such determination of personal qualities is a prerequisite for planning further measures to achieve goals.

In the process of "end-means" analysis, the means (personal, financial, time) necessary to achieve the desired goals are compared to the real situation. For professional goals, in the "means" column, you should indicate the qualifications necessary to achieve them and set specific realistic goals for gaining experience and abilities that you still lack.

**The last phase of goal setting is formulation of goals**

**Formulation of goals.**

The formulation of goals involves fixing the terms of their implementation and the expected results.

Each goal makes sense only when the terms of its implementation are established and the desired results are formulated.

It is necessary to formulate a goal:

- specifically;
- with reference to terms;
- so that it has a unit of measurement.

Examples:

1. Let's say the manager returned from vacation, he had a good rest and set himself a goal: "to always be in shape, not to allow yourself to get tired and lose work capacity."

Did he formulate the goal well?

Such formulation of the goal under the influence of inevitable organizational complications in the life of the manager, most likely, will not allow to achieve the desired.

In order for such a goal to be achieved, it is necessary to imagine a number of specific goals. Example:

- Quit smoking from the next day.
  - Play tennis twice a week.
  - Swim twice a week.
  - Do yoga for twenty minutes a day.
  - During the month, carefully monitor the use of your time.
2. "By Christmas, reduce your weight by 5 kg."
- this goal is well formulated, but it also needs specification, development of an action plan.

3. But such a wording of the goal, such as, for example: "To be happy at work" - most likely it will remain a good intention, if it is not specified, for example, like this:

1. By the end of the year, determine your main goal in professional activity and the nearest goals for its implementation.

2. Before the beginning of the new year, develop long-term and short-term plans for the realization of professional goals.

3. During the month, make an inventory of your activities and analyze the use of time.

4. During the next week, with the help of special tests, analyze your strengths and weaknesses (in terms of personal and professional qualities).

5. Constantly work on yourself to correct your weaknesses and strengthen your strengths.

6. Identify people who can help to achieve the goals.

The process of setting goals ends with drawing up someone's personal life plan (or life and career plan), in which one (taking into account everything stated above) writes down the most important personal and career goals, as well as intermediate goals to achieve the main life goals and the terms of their fulfillment.

For career planning, it is important to know the following:

"A small step that starts right away sometimes gives more effect than big, strategic ideas, from which protracted actions follow."

When formulating the goals, one should remember such aspects as physical condition and health, as they are an indispensable condition for an active life, successful self-management and career.

For this, it is necessary to include sports events in plans (annual, monthly, weekly, daily): gymnastics, swimming, cross-country skiing, yoga, etc.

One should also never forget about self-education, professional development, and cultural education.

Setting specific short-term goals that are aligned with some long-term, global goals is necessary because on the way to fulfilling long-term goals, we sometimes encounter changes in external conditions. Therefore, along with general goals, it is important, from the point of view of psychological motivation, to set short-term achievable intermediate goals and achieve intermediate successes.

Your personal goals may change over time. Therefore, you should regularly review your goals, check whether they have retained their relevance for you at the current moment.

A reassessment of your goals may occur in connection with a change in the surrounding environment under the influence of a number of factors:

- change in the quality of life;
- financial and economic crises;
- widespread unemployment;
- change in the ecological situation;
- natural disasters;
- the changing cost of energy resources;
- etc.

A reassessment of your goals may also occur in connection with a change in your internal personal value system.

It is necessary to check whether your goals have remained relevant systematically and annually!

Conclusions.

1. Setting goals in self-management is carried out by:

- finding goals, that is, analyzing what I want;
- situational analysis, i.e. what can I do;
- determination of one's strengths and weaknesses;
- development of target strategies and methods of achieving goals;
- formulation of goals: - what I specifically strive for.

2. To set goals, you need:

1. ensure clarity of goals - what you specifically want to achieve - develop life goals;

2. make an "inventory description" of goals, that is, bring together your personal and professional guidelines;

3. situational analysis is an analysis of your personal resources (or means) to achieve goals - it allows you to identify your strengths and weaknesses;

4. the next step is the "goal-means" analysis - the means needed to achieve the goals are compared with the real situation;

5. specific practical goals (or tasks) follow from the measures you determined during the analysis, necessary to achieve the goal. The formulation of goals involves fixing the deadline and specific results.

6. Intermediate practical goals are fixed in the life and career plan, which must be regularly checked, reviewed, and supplemented.

Every day, as you do your work, ask yourself the following questions:

- "Does what I am currently doing bring me closer to achieving my respective goal?"

When studying the topic "Setting goals", students should know the essence of the concept of "goals", the meaning of the ability to set goals correctly. It should be understood that "thinking with goals" means knowing in which direction one should go when performing work and what the final result should be.

The process of setting goals consists of 3 phases:

- 1) finding goals;
- 2) situational analysis;
- 3) goal formulation.



## **Topic 3. Manager's work planning**

### **Lecture plan**



- 1. Basics of working time planning.**
- 2. Principles and rules of working time planning.**
- 3. Working time planning system.**
- 4. Methods of planning working hours.**

### **1. Basics of working time planning**

The new generation of managers and businessmen pay great attention to planning and efficient organization of their work, more rational use of working time, because the irregularity of the day creates an unproductive style and leads to irrational use of time in all spheres of activity.

Planning as a component of self-management tasks and rules means:

- ✓ preparation for the realization of set goals;
- ✓ time management.

The main benefit of planning is that planning your time saves you time.

Practical experience shows that an increase in planning of time leads to a reduction in time waisting.

It is obvious that the planning process cannot be stretched arbitrarily to infinity, because there will not be time left for the planned execution. That is, there is an optimal planning period.

The general rule is as follows:

"Who regularly prepares his working day for 10 minutes, saves 2 hours every day, and also copes with important matters more successfully."

From the total planning period (year, month, week, day), a maximum of 1% of time should be spent on planning. For example, it takes 5-10 minutes to develop a daily plan.

Unfortunately, many people mean by planning a simple record of the next day's current affairs. At the same time, they are limited to an attempt to objectively estimate the amount of future work without analyzing the time budget, having only a list of works.

To learn how to plan, consider the basic principles and rules of planning.

## 2. Principles and rules of working time planning

### Rules

1. In perspective planning, attention is paid to strategic issues.
2. Work in accordance with the approved work regulations of units, the established management hierarchy and demand compliance with the regulations by deputies and subordinates.
3. Strictly adhere to the daily routine and work schedule, demand this from subordinates.

4. Manager needs to periodically review the tasks he has solved to determine whether they could be completed in a shorter period of time.

5. Start planning each working day by separating the top-priority tasks from the current tasks that could be delegated to subordinates.

6. For heads of functional departments and services, a structure of time expenditure is appropriate, in which a sufficient place is given to analytical work of a perspective nature (their activity is reduced to the development and justification of proposals within the appropriate limits).

7. With smart planning there is more time. Every hour spent on effective planning saves 3-4 hours of execution time. Failed planning is planning to fail. The lack of plans for personal work leads to the fact that current issues push more important matters to the background. With a lack of time for managerial activities, the following will be characteristic: lack of planning in the use of working time and weak processing of priorities, nervousness and confusion in actions, impatience in decision-making, in relation to equals in rank and subordinates, an insufficient level of distribution of managerial work in units and a low degree delegation, lack of order in the workplace, excess and unsystematic correspondence on the desktop,

8. Lack of time for rest, bad sleep, and, accordingly, a bad mood the next day. For mental activity, mood is of great importance - it is 70% of productivity.

9. Plan time in accordance with the importance of tasks, and not with their specific weight in the total number of cases.

10. When making a plan, use the 60:40 ratio, that is, the basic rule of time planning:

- ✓ 60% – scheduled time;
- ✓ 20% – unforeseen time;
- ✓ 20% - spontaneous time.

### Principles

1. List all works that are planned for implementation in the future planning period. You can take the unfulfilled ones from this list as a basis for filling the "vacant places" when drawing up a plan for the next period.

2. Regularity – systematicity – consistency. Work on your time plans regularly and systematically, consistently finish all the things you start.

3. Realistic planning. Do not go to the extreme of over-planning and plan only the amount of tasks that you can realistically handle.

4. Adaptability. Be flexible, because timekeeping plans are not made to make life easier, but to achieve goals.

5. Recovery of lost time. Try to immediately recover lost time. It is necessary that things do not "hang", but are completed.

6. Written form. Make time plans on the forms of your production or on specially designed cards and you will always have a complete overview of things.

7. Transfer of unfinished tasks. Transfer unfulfilled but important tasks to the plan for the future period. Thus, they are automatically taken into account when developing new plans.

8. Fixing results instead of actions. Plan for results or achieved goals, not just any action.

9. Establishing time norms. Set exact time norms, provide in your plan exactly as much time for this or that matter as it really needs.

10. Terms of execution. Set exact deadlines for all activities. In this way, you will get used to self-discipline. Avoid indecisiveness, slowness and procrastination.

11. Setting priorities. Determine exactly which work you prefer and, based on this, establish the sequence of work.

12. Getting rid of the "tyranny of urgency". Learn to distinguish the important from the urgent and get rid of the "tyranny" of urgent matters. The most urgent matters are not always the most important, but it is the urgent and urgent matters that take up a large part of our time. The "tyranny" of the urgent arises due to the incorrect selection of priorities, giving priority to the unimportant. As a result of poor planning, unimportant matters become urgent.

13. Delegation (reassignment) of cases. From the very beginning, it is necessary to establish in your plans what work you must do personally, and what work can be reassigned (delegated).

14. Time "absorbers" and time reserves. Allocate an appropriate percentage of your time as a reserve for unexpected visitors, phone calls, unexpected problems, or in case of underestimating the duration of certain cases, and strive to reduce the number and volume of "time sinks".

15. Rework - recheck. Constantly revise and check your plan from the point of view of whether certain tasks (goals) can be fully implemented.

16. Free time. Plan and make good use of your free time.

17. Time blocks and quiet time (closed hours). Reserve long continuous periods of time for large-scale tasks (quiet time, closing hours) and shorter intervals for a few small tasks. If possible, use this time in the morning "behind closed doors".

18. Time for planning and creativity. The corresponding part of the time should be left for planned, preparatory and creative work, as well as for professional development.

19. Routine work. Schedule routine functions such as reading monthly reports, walking around the facility, etc. It is also necessary to highlight and group small works separately.

20. Unproductive activity. Make sure that non-productive activities such as making photocopies, non-essential fees, etc. would spend as little time as possible. Limit yourself only to what is really necessary, because you will not be able to use your time for more important things.

21. Alternatives. When planning, try to think quickly, according to the principle "there is always another, better way."

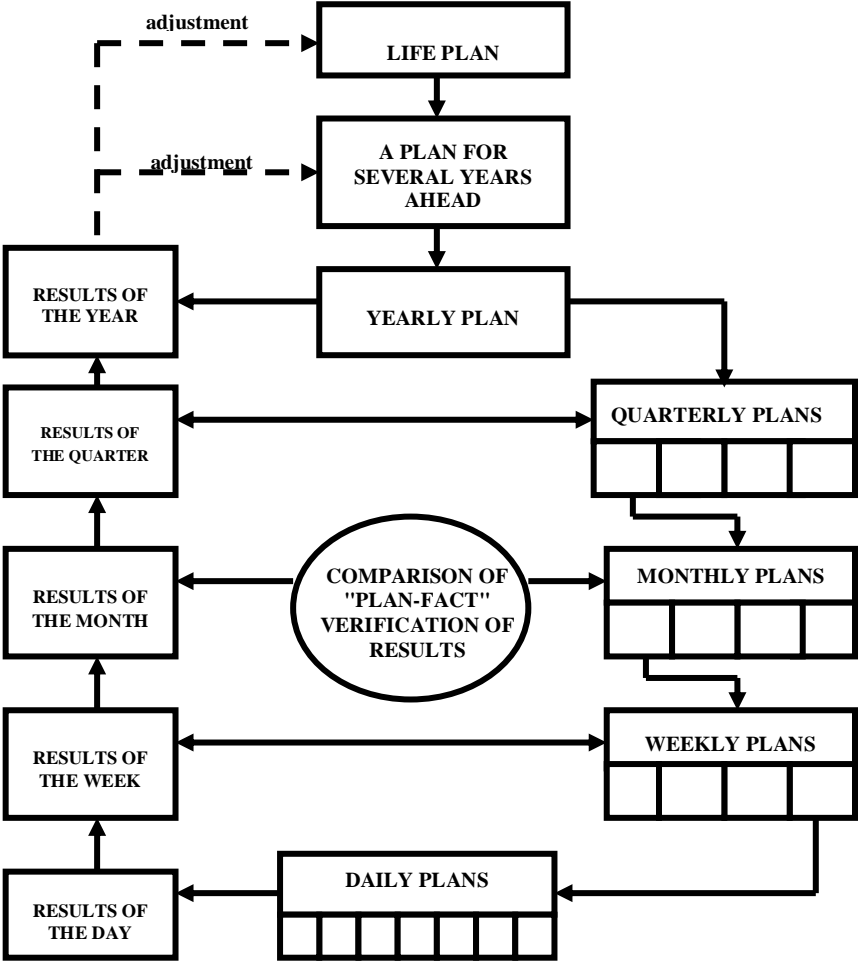
22. Diversity. Bring diversity to your activities, alternating the implementation of long- and short-term projects, individual work with group work.

23. Consistency of time plans. Strive to make your working days full and implement your plans, so coordinate them with the plans of other people (secretary, boss, subordinates, colleagues).

### 3. Working time planning system

The time planning scheme is presented as a closed system in

which the



relationships between individual types of plans are clearly visible: long-term plans are specified in the corresponding medium- and short-term, annual, and then in current period plans - quarterly, monthly, decadal, which are ultimately embodied in plans day

After the end of the corresponding planning period, what was planned and what was actually performed is compared, the results of the period are determined, which are taken into account for adjusting plans for the next period.

If you decide to make your life plan, then the long-term plan will serve as a basis for the planning process.

From the plan for several years ahead, you derive the annual plan by transferring to it from the corresponding annual column all those tasks that you have outlined for yourself.

At the end of the current year, you need to make a plan for the next 12 months, preferably with a quarterly breakdown.

Based on the quarterly plan, a monthly plan is drawn up, then a ten-year plan. This already increases the accuracy of planning - in the monthly plan, tasks are taken into account with greater detail, time spent is measured in hours.

The last and at the same time the most important step in the time planning system is the daily plan, which concretely implements the set goals.

Thus, after considering the system of planning working time, we see that planning is a gradual advance towards your main goal by dividing the overall task into parts. And this is done so that different actions can be distributed in time.

#### **4. Methods of planning working hours.**

The most common methods of planning working hours are:



1. The "Alps" method
2. Time diary.
3. SMART goal-setting technology (according to D. Doorden)

### Method "Alps"

The method takes 5-10 minutes and includes 5 stages

### Stages of working time planning according to the "Alpa" method

Stage	Tasks to be completed
<b>The first stage</b> <b>Making a list of tasks</b>	Write down in the appropriate sections of your daily plan everything that needs to be done the next day: 1) tasks from the to-do list from the weekly (monthly) plan; 2) unfinished business the day before; 3) added cases; 4) urgent cases; 5) tasks that periodically arise. At the same time, generally accepted abbreviations should be used: B - visits or business trips; M - meetings; D - delegation of cases; C - control; P - in the process, in work; T - telephone conversations
<b>II stage</b> <b>Evaluation of the duration of actions</b>	An approximate time for its completion should be set against each task. Then sum up everything and determine the total time.
<b>III stage</b> <b>Time reservation (in the ratio of 60/40)</b>	When making a daily plan, you must follow the principle of "60:40". With an 8-hour working day, the planned time should be no more than 5 hours. If it is not possible to comply with such a proportion, then it is necessary: 1) reduce the list of cases; 2) do it at the expense of less important matters; 3) reassign; 4) reduce the time for each task; 5) postpone part of the affairs until tomorrow; If it doesn't work, you have to work more than 8 hours
<b>IV stage</b> <b>Making decisions on priorities and delegation</b>	The goal of the stage is to reduce the time spent on the tasks of the day. For this purpose, it is advisable to: - set priorities for your affairs (for example, with the help of ABC analysis) and clarify the tasks of the day based on them; - check once again the deadline for completing all tasks; - consider the possibility of delegation of cases.
<b>V stage</b> <b>Control and transfer of unfulfilled</b>	According to experience, not all tasks can be completed, not all telephone conversations can take place. Therefore, they have to be postponed to another day. To reduce this probability, therefore, to rationalize the use of time, you can use graphic symbols - bureaucracy by using specific abbreviations in the plans: ! important <b><u>NB</u></b> !especially important ? find out + the priority of category A . task accomplished .. task accomplished particularly well

## **Time diary**

*It is the most important working tool of personal self-management. The method involves the simultaneous compilation of: a reminder calendar, a personal diary, a notebook, a directory, a subscription book, a file of ideas, and it is a planning and control tool.*

### **Structure of the time diary**

The calendar part contains forms for monthly, ten-day and daily plans. Special importance is attached to the daily plan. The principle is one letter per day.

Separation of business and personal dates - you can make notes so that you always have the most important information with you, for example:

- deadlines for holding seminars, meetings;
- salary and income tariffs;
- lists of birthdays and other important dates;
- postal tariffs;
- schedule of planes and trains;
- hotel addresses;
- calendar of football matches;
- cards for recording ideas.

Section “addresses and telephones” contains information about the most important telephone numbers and addresses that are most often used.

General part: various business cards, official pass, photos, etc.

The time diary improves the quality of work. With an 8-hour working day, rational keeping of a time diary allows you to save a whole hour every day.

SMART goal setting technology (according to D. Doorden)

SMART technology sets target quality criteria that must be followed when laying a target, is a very convenient and compact tool. This management technology can easily be incorporated into the meeting format. As practice shows, the time spent on using the SMART algorithm (with the necessary factual information prepared in advance) is usually between 45 and 90 minutes.

The name of the technology is an abbreviation made up of the first letters of English words that name the relevant quality criteria of the goals:

S (specific) – each goal must be described as a clear, specific result;

M (measurable) – the goal must be measurable using specific indicators and standard measurement procedures;

A (assignable) – the goal must be non-accidental, justified, proven, vitally necessary for the organization;

R (realistic) – the goal should be realistic, in principle achievable;

T (time related) - the goal must be clearly defined in time, there must be specific terms (and control points) for its achievement.

The SMART technology was originally intended to control the quality of already formulated goals, but it can be used (in a slightly modified form; the letters in the acronym are subject to minor rearrangements) and as a way to determine the goal.

The algorithm for setting organizational goals using the SMART system is as follows:

1) a list of possible goals is written, and a group of experts carries out a specification of the result, trying to describe the intended result (S) as accurately as possible;

2) each of the goals is substantiated, experts assess the importance of each goal for the organization's activities, for this purpose separate criteria can be developed for evaluating the importance of goals (A);

3) experts predict and assess the degree of achievement of goals (R), including using numerical estimates of the probability of achieving goals, various achievement coefficients, etc.;

4) 3-5 criteria for measurement and control of achievement (M) are selected for each of the goals. It is important that these criteria for measuring results are quite convenient, and the mechanisms for their application already exist in the organization. One of such common criteria for goal measurability are financial indicators, and the financial documentation system adopted in the organization is usually used as the mechanisms for applying this criterion;

5) for the selected goals, the exact terms of their achievement are indicated, then a plan is written, in which the intermediate stages of achieving the goals (T) are distinguished.

It should be noted that in the ideal version, the algorithm for setting goals using the SMART system operates with an excessive number of goals, gradually at each stage a whole set, discarding weak goals that received the lowest or negative evaluations from experts. So,

- at the first stage, goals that cannot be turned into a concrete result are rejected;

– at the second stage, irrelevant activities of the target organization are reduced;

- on the third - "unattainable" goals (having a high level of risk, requiring large resource costs, etc.);

- at the fourth stage, goals whose feasibility is difficult or impossible to control are excluded;

– at the last stage of goal setting, a small number of "good" goals remain (as a rule, 5-7) and there is a kind of transition from strategic goal setting to operational planning.

## Topic 4. Organization of the manager's activities



- 1. Analysis of time use.**
- 2. Basic methods of organizing the manager's activities. Setting priorities.**
- 3. Basics of delegating.**

### **1. Analysis of time use**

Analysis of time use involves, first of all, conducting an inventory of all types of activities and the time spent on them. This allows you to identify the reasons for irrational use of time. Studies show that only 1 out of 100 managers has enough time. Others are missing from 10 to 50% of the time. Therefore, every successful manager values his time very much. In order to save time, you must first of all know what it is spent on. Therefore, managers regularly record and analyze the use of their time. This is the basis of self-management.

The main reasons for analyzing time consumption are as follows:

- it is not known exactly what the time is spent on;
- it is not known exactly how much time is needed to perform certain tasks;
- not all the strengths and weaknesses of the working style are known;
- it is not known what personalities or what other factors limit a person's ability to work.

In general, the time inventory includes:

1. Time consumption analysis.
2. Analysis of time losses - sources of losses.
3. Analysis of time wasters - reasons for irrational time wastage.

Time consumption analysis

Time spent during the day can be divided into blocks:

1. Vitality support (nutrition, sleep).
2. Restoration of working capacity (most effectively occurs with the help of physical exercises).
3. Auxiliary time (preparation of the workplace, search for materials).
4. Direct working time.
5. Gaining life experience (reading, non-work communication, visiting exhibitions, theaters, museums, etc.).
6. Losses.

In order to increase labor productivity, managers often increase working hours by redistributing time between separate blocks, however, this is unwise, because it negatively affects health, harms other, equally important aspects of life. It is more or less possible to reduce the fifth block, but this can only happen in extreme situations. Under normal life circumstances, it should be fully used, because without it, neither raising the cultural level nor accumulating life experience is possible.

Among the listed blocks for the organization of the personal work of the manager, the 4th block is the most important, i.e. the direct working time, during which regular types of work of a manager are

performed: work with mail, planning, meetings, meetings, telephone conversations, etc.

There are several classifications of types of expenses of the manager's working time. The most practically useful is the classification according to which the working time of a manager and specialists is divided into the following types:

- preparatory and final time: receiving the work assignment, familiarization with documents and regulatory materials, agreement and signing of documentation, preparation and cleaning of the workplace;

- operational time - work related to the performance of job duties: analytical, organizational, regulatory, technical, formal-logical, creative, etc.;

- unproductive work time: performing community service, correcting incorrectly performed work, searching for and delivering documentation, technical means and materials to the workplace, searching for or waiting for managers, co-executors, consultants, etc.;

- service time of the workplace: organizational, technical, informational;

- time of interruptions (or losses):

- a) those that do not depend on the employee: waiting, untimely service, non-compliance with the working hours of services;

- b) those that depend on the employee: extraneous conversations, performance of social duties during working hours, distraction from work, conversations on personal issues, other losses.



The simplest and most effective method of accounting and analysis is a self-photograph of working time, which consists in sequentially recording during the day all the work performed and fixing the time spent on each type of work. It is recommended to take self-photographs every day for two to three weeks. Such photos should be taken systematically:

- continuous photography (that is, all types of work are recorded)
- once a year;
- selective photography (certain types of work) - two or three times a year.

It is especially necessary for managers to observe the costs of their working time at the beginning of their work at a new place.

### **Analysis of time losses**

This stage of time analysis is aimed at identifying critical moments, bad habits and those mistakes that are most often repeated in the working style of a certain person. By identifying and analyzing the main time wasters, each person can identify their weaknesses, pay more attention to them and eliminate them from their activities as a whole, optimizing their work activities.

The most common in practice are the following types of time loss:

- loss of time when defining a goal (not all problems are considered and analyzed, too many goals are set);
- loss of time during planning (whether the possibility of certain difficulties is considered, whether backup time is planned, how clearly defined are the deadlines for the completion of certain tasks);

– loss of time in the development of decisions (whether the priorities of the cases are correctly determined, how proportionally the time is distributed between the tasks);

– loss of time due to poor organization of work (duration of work on one problem, amount of paper information, its systematization and utilization, level of use of modern work automation tools);

– loss of time at the very beginning of work (when planning takes place: in the morning or the night before, which tasks are solved first: simple or complex);

– loss of time when arranging the daily routine (to what extent the biorhythm is considered when planning and organizing time);

– loss of time when processing information (whether the importance, relevance and reliability of the information collected for further processing and use are considered, according to which principles and rules work with documents is carried out: marks, extracts, copies, etc.);

### **Analysis of time "absorbers"**

Time "absorbers" are those people or other factors that take up (absorb) time to the greatest extent.

The most typical time sinks:

- unclear setting of goals;
- lack of priorities in matters;
- the need to do a lot at once;
- lack of a holistic view of tasks and ways to solve them;
- unsatisfactory planning of the working day;

- personal disorganization, "cluttered" desk;
- insufficient motivation;
- search for documents, memos, addresses, phone numbers;
- shortcomings of cooperation or division of labor;
- distracting phone calls;
- unplanned visitors;
- inability to say "no";
- incomplete or late information;
- lack of self-discipline;
- inability to bring the case to completion;
- distraction;
- long meetings;
- lack of communication links;
- fairly high sociability;
- postponement of cases;
- insufficient delegation of cases.

## **2. Basic methods of organizing the manager's activities. Setting priorities:**

To set priorities means to decide about the sequence of solving tasks, that is, which of the tasks should be given priority, secondary, etc. value.

For most managers, the main problems are due to the fact that:

- managers try to do too much work at once;

- managers scatter their energies on separate, often insignificant matters.

Let's consider the criteria and methods by which you can establish the order of your most important things, that is, determine priorities.

Pareto principle (ratio 80:20)

The Pareto principle generally states that within some group, individual small parts show much greater importance, which corresponds to their relative weight in this group.

The principle was formulated by the Italian economist Vilfredo Pareto in the last century.

The Pareto principle has been repeatedly confirmed in practice in various fields.

Thus, American engineers, applying the Pareto principle in inventory, found that 20% of the inventory usually accounts for 80% of the inventory value to be accounted for. Focusing control on just this 20% of inventory resulted in significant cost savings compared to other inventory methods.

Examples from business practice confirm that:

- 20% of customers (goods) give 80% of turnover or profit;
- 80% of customers (goods) bring 20% of turnover or profit;
- 20% of errors cause 80% of losses;
- 80% of errors cause 20% of losses;
- 20% of the initial products determine 80% of the cost of the finished product;

- 80% of the raw products determine 20% of the cost of the finished product.

Thus, when they talk about the Pareto principle, they mean the 80:20 ratio.

Transferring this pattern to the manager's work situation means that in the work process, 80% of the results are achieved in the first 20% of the time spent.

Thus, the Pareto principle (ratio 80:20) in relation to the rational use of time says: "80% of the final results are achieved in only 20% of the time spent, while the other 20% of less important tasks "absorb" 80% of the working time."

In relation to everyday work, this means that you must always perform "vitaly important" tasks first, and only then - numerous secondary ones.

Now our task is to find the 20% of things that provide 80% of success. For this, there are methods of setting priorities.

***The application of the Pareto principle is specified if all tasks are analyzed according to their share in the final result and then divided into categories A B C.***

Establishing priorities using A B C analysis

With the help of A B C analysis, you ensure the ordering of tasks according to their importance and the orientation of work results to achieve the greatest effect.

The letters A, B, C stand for three classes of tasks according to their importance in terms of achieving professional and personal goals.

The A B C analysis is based on the following 3 regularities, confirmed by experience:

<b>Task A</b>	<b>Task B</b>	<b>Task C</b>
<b>The most important</b>	<b>Important</b>	<b>Less important</b>
15% of all the tasks 65% of the overall importance	20% of all the tasks 20% of the overall importance	65% of all the tasks 15% of the overall importance
<b>Fulfill by yourself</b>	<b>Partly delegate</b>	<b>Fully delegate</b>

1) The most important tasks (category A) make up approximately 15% of all the tasks and tasks that the manager is busy with. The importance of these tasks (in terms of their contribution to achieving the goal) is 65%.

2) Important tasks (category B) account for an average of 20% of the total number, as well as 20% of the significance of the manager's tasks and affairs.

3) Less important and non-essential tasks (category C) make up 65% of the total number of tasks, but have an insignificant share (approximately 15%) in the total "cost" of all tasks that the manager must perform.

- the most important tasks that bring the greatest result (matters A) should be tackled first in order to ensure a large part of the overall effect with the help of some actions.

- tasks B, which are next in importance, also account for a significant part of the overall result, while the performance of a larger number of, but less important tasks in general gives a small result.

The main difficulty is to accurately determine the same 20% that determine the success of the case!

Application of A B C analysis

You can analyze your tasks according to the A B C method in the following way:

1. Make a list of all future tasks (or tasks) in the corresponding period of time (month, day, etc.).

2. Systematize tasks according to their importance, set the sequence of tasks according to their importance for your activity.

3. Number your tasks.

4. Divide your tasks according to categories A, B, C:

- A – the first 15% of all tasks (very important, having the greatest significance) – are not subject to reassignment;

- B – the next 20% of tasks - category B (very important, but they can be completed in the second place) – can be reassigned to be performed by other persons;

- C – the other 65% of all tasks (category B) are less important, insignificant. They must be reassigned in any case.

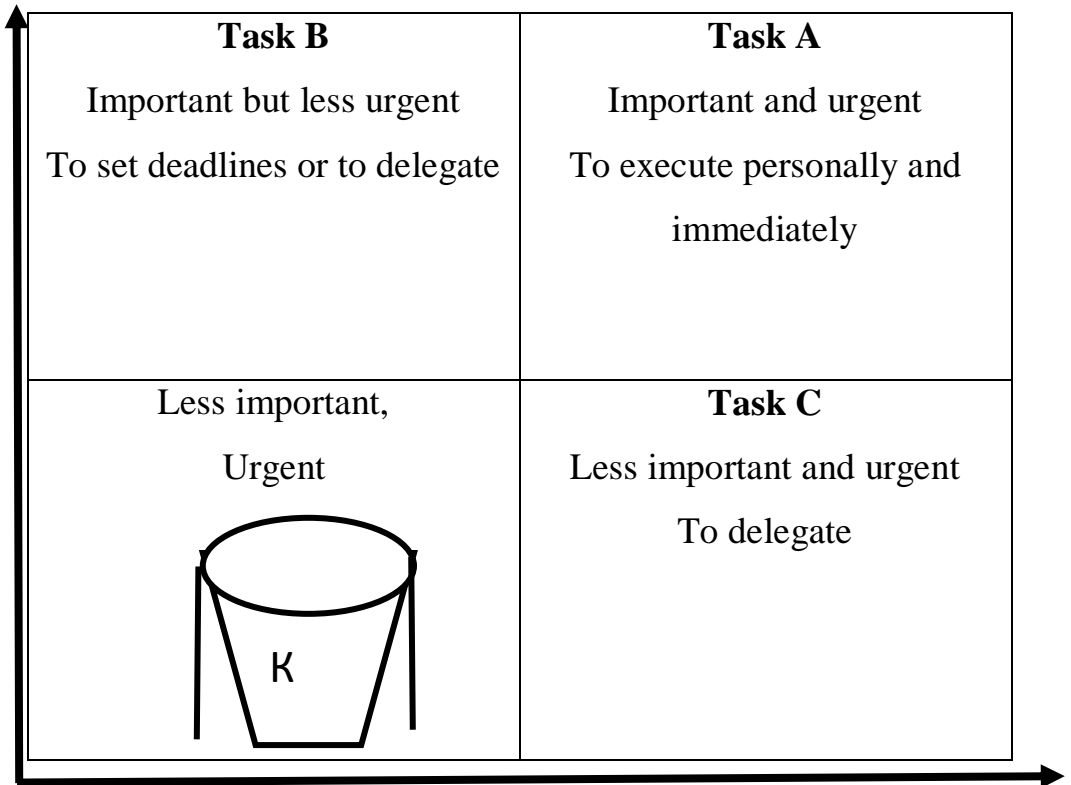
### **The Eisenhower Principle**

There is a method of accelerated task priority analysis, developed by the American General Dwight Eisenhower. It is used in those cases when it is necessary to quickly decide about which tasks to give priority to.

According to this principle, priorities are set according to such criteria as the urgency and importance of the matter.

**Scheme of setting priorities according to criteria:  
"importance" and "urgency"**

**Importance**



Depending on the degree of urgency and importance of tasks, there are 4 possibilities for their assessment and implementation:

1) Urgent and important matters (upper right quadrant). - You should immediately accept them and fulfill them yourself. They correspond to the tasks of category A.

2) Important, but less urgent tasks (upper left quadrant) - tasks of category B. - They do not need to be performed urgently. They can usually wait. However, there is a danger that sooner or later these tasks



will turn into urgent ones, and you personally will have to solve them in the shortest possible time.

Therefore, it is necessary to try to entrust such tasks, if possible in whole or in part, to your employees. In this way, you relieve yourself and contribute to the motivation and improvement of the qualifications of your subordinates, entrusting them with responsible affairs.

3) Urgent, less important matters (lower right quadrant) – tasks of category C. There is a danger here of falling under the "tyranny" of urgency and, as a result, completely committing to solving a specific task because it is urgent. If it is not so urgent, then it should be delegated in any case, since its execution does not require any special qualities.

4) Less urgent and less important matters.

Very often, cases of this category settle on the desk. If you start doing these things, then the tasks of the first category are not fulfilled, or you are overloaded and, as a result, stressed.

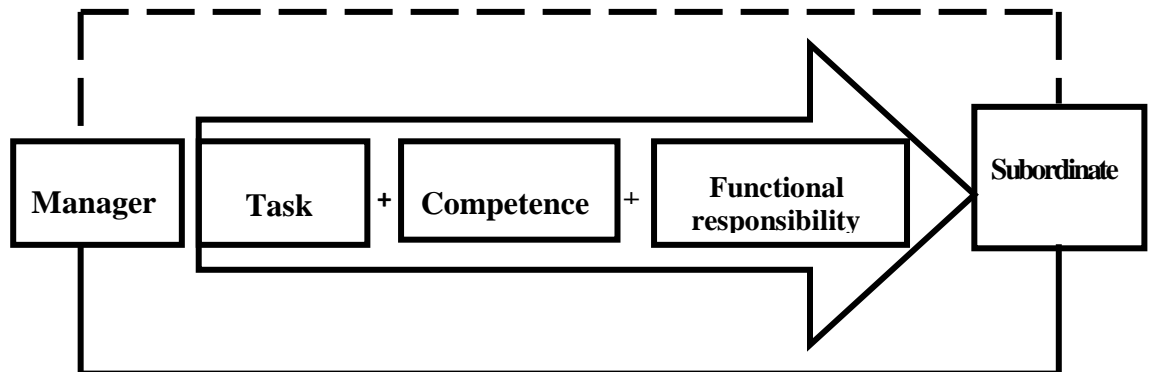
Such non-essential and non-urgent matters should be avoided. Do not be afraid to send them to the archive or to the trash

If you consistently categorize your tasks according to the Eisenhower principle, you will greatly increase your productivity!

### **3. Basics of delegation**

Delegation is the assignment of a work task, as well as the transfer of competence and responsibility for its implementation.

The scheme of entrusting a subordinate with a task or activity from the area of the manager's tasks



That is, simultaneously with the work task for its implementation, the necessary competence and responsibility in a special area (functional responsibility) must be delegated. The manager retains responsibility which cannot be delegated.

Delegation can be either carried out for a long period of time (long-term or general delegation) or be limited to one-time assignments (one-time delegation).

### **Advantages of delegation**

Delegation means self-discharge. It frees up time for management functions (Task A) and provides opportunities for employees to reveal their abilities (motivation).

Delegation is equally beneficial for the manager and subordinates.

Despite a number of advantages of delegation, in practice it is not always used effectively. The reasons for unsatisfactory delegation most often lie in the characteristics of the manager's personality. This is, for example, an underestimation of delegation or insufficient mastery of the delegation technique.

## **Conditions of delegation**

Successful delegation assumes:

- 1) willingness to delegate (desire);
- 2) ability to delegate (possibility).

Basic rules (techniques) of delegation

- ✓ Select suitable employees;
- ✓ Distribute spheres of responsibility;
- ✓ Coordinate the performance of assigned tasks;
- ✓ Stimulate and advise subordinates;
- ✓ Monitor working hours and results;
- ✓ Evaluate your employees (primarily praise, but also constructively criticize);
- ✓ Stop reverse delegation attempts.
- ✓ Rules of delegation for subordinates
- ✓ Independently carry out delegated activities and make decisions under own responsibility;
- ✓ Inform the manager in a timely and detailed manner;
- ✓ Notify the manager of all unusual cases;
- ✓ Coordinate your activities with your colleagues and take care of information exchange;
- ✓ Improve qualifications to meet the requirements of the position.

For a manager, the problem of delegation is not how many things he should delegate in order to relieve himself and free up his time, but

how many things he can delegate without making excessive demands on his subordinates.

What to delegate and what not?

In any case, it is necessary to delegate:

- ✓ routine work;
- ✓ specialized activity;
- ✓ private questions;
- ✓ preparatory work (projects, etc.).

Not a subject for delegation:

- ✓ such functions as setting goals, making decisions on developing the company's strategy, monitoring results;
- ✓ management of employees, their motivation;
- ✓ high-risk tasks;
- ✓ unusual exceptional cases;
- ✓ urgent cases that do not leave time for explanation and re-examination;
- ✓ question of a purely trusting nature

When should you delegate?

In daily work situations: as often and as much as the working environment and potential of employees allow;

In case of significant changes: in the working situation, which require a new distribution of functions and powers, namely:

- ✓ when changing the personnel structure (new appointment, promotion, dismissal);

- ✓ during the reorganization and structural restructuring of the department;
- ✓ in case of special events, crises;
- ✓ with the emergence of new areas of activity or with a change in competence.

To whom to delegate?

Employees under your direct supervision.

It is necessary to delegate not only to the most capable employees who can take on additional work, but also to employees who have free time. Consider also the possibility of delegating to employees who want to take on difficult tasks and who need to gain experience, as well as those whose abilities need to be tested and further disclosed.

You can also delegate not only to your subordinates, but also to other divisions, as well as to service departments.

6 questions that can help you in deciding on delegation:

- 1) What should be done?
- 2) Who should do it?
- 3) Why should he/she do it?;
- 4) How he / she should do it?;
- 5) With what should he /she do it?
- 6) When should he/she do it?

How to delegate?

- ✓ Delegate early!
- ✓ Decide about what and to whom you want to delegate immediately after drawing up a work plan.

- ✓ Delegate according to the abilities and capabilities of your employees.
- ✓ Delegate also considering the need to motivate and stimulate your employees.
- ✓ Delegate the task or work as much as possible.
- ✓ Explain to the employee what we are talking about: a special case or a long-term delegation.
- ✓ Delegate similar tasks to the same employee whenever possible.
- ✓ Make sure whether the employee can and wants to undertake this work.
- ✓ Do not assign the same work to two employees who do not know about it for reliability.
- ✓ Transfer to the employee, together with the work task, the authority and competence necessary for its implementation.
- ✓ Give as complete and accurate instructions and information about the task as possible and make sure that the delegated task is understood correctly (because the employee can only do what you tell him to do, not what you imagined when you outlined the task).
- ✓ Explain the content and purpose of the task (that is, give motivation and goal setting).
- ✓ Large and important tasks should be assigned in a commanding tone, if necessary - in writing.

New and difficult tasks should be assigned gradually:

- ✓ train an employee;
- ✓ explain the task;
- ✓ show how to do the work;
- ✓ entrust the employee with further implementation under supervision and correct it;
- ✓ transfer the work to the employee in its entirety and carry out only control over execution.

Provide the employee with the opportunity for further professional training.

Provide access to any necessary information.

Avoid interfering with the work process without good reason and thereby "overriding" the delegation.

Assure the employee that in case of difficulties and problems, he can always ask you for advice and support.

Require the employee to report at regular intervals on how the case is progressing.

Control the final results of the assigned case and immediately inform the employee about the control results.

Constructively praise successes and criticize shortcomings and failures in work. Allow the employee to either present the task assigned to him at higher authorities as his work, or be a co-author in its presentation at the appropriate level.

The degree of employee participation in the delegation process reflects the manager's ability to perform his functions!

## **Topic 5. Control in self-management and self-motivation**



**1. Concept of self-motivation, causes of demotivation.**

**2. Control function in self-management.**

**3. Process and result control.**

**4. Self-control.**

### **1. Concept of self-motivation, causes of demotivation**

Self-motivation (internal motivation) is the desire to perform an activity for its own sake, for the sake of the reward contained in this activity itself.

The reward is "a moment of experiencing something greater than ordinary existence". Very often, the main motivator for such people is self-realization. It should be noted that the need for self-realization, on the one hand, can be useful for the manager: there is no need for intense employee motivation. But there is a possibility that any employee, losing interest in work, will become virtually unmanageable and freely leave the company.

Self-motivation is a person's ability to transfer work from the "need" category to the "want" category. It is believed that the internal motivation of the applicant when employed in the company is the highest: he is inspired, full of hopes and believes in his success.



Gradually, if you imagine motivation in the form of a curve, it begins to go straight, wave-like, or go downward - depending on how well the expectations have been met, what results the employee achieves in his professional activity. The task of the manager and the employee himself is to constantly direct the "line of motivation" upwards. Otherwise, it will reach zero value, which actually means the release of a person.

Loss of motivation is called demotivation.

Demotivation is the result of an internal conflict when an employee understands that he needs to move forward, but he does not want to do it. There are many reasons for the loss of motivation: from the unsuccessful adaptation of a newcomer to the company to the lack of rewards promised by management when the necessary results are achieved at work.

Reasons for employee demotivation include the following:

- lack of recognition, public encouragement, career growth;
- work is not interesting enough to stimulate;
- staff are not involved in decision-making, implementation of changes, discussion of strategic problems of the organization's development, etc.;
- ideas and suggestions are not supported, not listened to;
- lack of professional development (assignments, training);
- constant criticism of work without positive assessment of achievements;
- excessive workload: people are unable to cope with it, pressure and impatience from the administration is felt.

The main factors of demotivation are also the following:

- ignorance of the company's goals, disagreement with them;
- failures due to incompetence (solution by implementing an internal evaluation system and further training of personnel, creation of a corporate training center);
- lack of clear coordination of the activities of employees and divisions, cross-functional relations in the company (solution by implementing a system of standards that describe the main business processes, methods of working with orders, customers, complaints, product shipment processes, meeting and organization regulations work of departments, job descriptions of employees, etc.);
- discrepancy between reality and expectations;
- personal problems of the employee.

Levels of motivating motives:

Level 1 - money: the lowest level of the motivation scale according to R. Hubbard's classification. People who are motivated solely by money are not always loyal and productive employees. They have no desire to create. They do not feel satisfaction from well-executed projects, do not know the feeling of respect and pride for themselves. Such people have a low level of responsibility and ethics.

Level 2 - personal benefits: the employee's goal is not money itself, but what it can give (car, house, etc.). It is important for a person to have a certain personal status, image, desire to occupy a good position, to have corporate privileges. Employees whose motivation is at this level are rarely loyal and efficient.

Level 3 - personal conviction: such an employee has a desire to realize himself, he wants to perform difficult tasks, participate in stressful projects in order to prove to himself and the company that he can cope with them. Work for such a person is interesting in itself, it brings him joy and satisfaction not only as a source of income, but also because the employee is proud of his/her results. Most often, an employee with the third level of motivation is efficient, dedicated to the company and very ambitious.

Level 4 - a sense of duty: a person is driven by an idea, a high goal. Such people are extremely effective, always devoted to their work and organization. These are usually business owners, as well as employees who share the company's mission with them. They do not need to be forced to work, they are quite dedicated.

An effective method of motivation is a developing conversation between a manager and a subordinate. Such a dialogue involves assessing the competence and efficiency of the employee "for today" and setting new goals and tasks "for tomorrow". Usually, such a meeting takes place at the beginning of the year. As necessary, interim control of achievements is carried out, and at the end of the year - a final assessment of what has been achieved. During the conversation, the boss appeals to a person's internal motivation, trying to "turn on" his activity and responsibility. The best way to do this is not to give an instruction or order, but to give a choice: how to achieve the desired more effectively.

There are a large number of approaches and techniques that can help a manager develop self-motivation in employees:

- "I want-I can" matrix;
- reframing.

The basic principles of self-motivation of employees are determined by how much a certain person wants (has self-motivation) and can (has certain knowledge, skills, abilities) to work (Fig. 5.1).

Reframing is a special technique that allows you to see a situation, a fact, an action in a different way, from a different angle. The success of reframing implementation depends on the level of compliance with its basic rules

Using reframing, the manager does not deceive the subordinate, the positive side of the situation must always correspond to reality. It is possible to familiarize employees with reframing in the form of trainings and consultations, clearly showing its advantages in the development of self-motivation

<b>Possibilities</b>	
<p style="text-align: center;"><b>“I can – I do not want”</b></p> <p>The employee is competent, but he has no desire to work. Often these are old experienced professionals who suddenly lost their will ("burnout" syndrome). The manager should conduct a developmental conversation (with the employee or colleagues), analyze the results of the subordinate's work, determine the reasons for the decrease in efficiency indicators, and their causes. You can offer a person to compete with younger employees who quickly became the "stars" of the department.</p>	<p style="text-align: center;"><b>“I can – I want”</b></p> <p>A person has internal motivation and the necessary competencies for his position. This is a real workaholic who should be protected. The manager needs to be happy for such a valuable employee and support his self-motivation. It can be a "challenge" in tasks (for example, an assignment to agree project documentation with an important, but very difficult client, with which another employee did not manage to work), and new projects, and another direction of activity.</p>
<p style="text-align: center;"><b>“I cannot – I do not want»”</b></p> <p>Often these are tired, negative people who dream only about the end of the working day as soon as possible. Or they are employees who want to accumulate experience for their resume, but prefer to deal with personal matters rather than responsibilities.</p>	<p style="text-align: center;"><b>“I want – I cannot”</b></p> <p>The employee is full of desire to work, but does not know or is not able to do anything. Most often, these are newcomers or experienced specialists who have been promoted or transferred to another position, where, however, they lack the necessary competencies. The manager and HR manager need to find out and conduct additional training.</p>
<b>Desire</b>	

**Fig. 5.1 Self-motivation matrix "I want - I can"**

A person's propensity for independent, active and responsible problem solving is one of the most important qualities in business, which allows you to give a specific employee a high degree of trust, additionally motivating him, expanding the limits of his independence in achieving results.

To form a successful model of behavior, a manager in the process of management and motivation can use the following recommendations:

- delegation of responsibility, i.e. transfer of tasks and powers to an employee who is responsible for their implementation;

– training employees in ways to resolve conflict situations and controversial issues;

- use of the map of employee motivators: if one of his motivators is the result, then the manager shows the subordinate that the solution to the problem is the result itself, that is, the motive becomes autonomous;

- the manager is obliged to make sure that the employee knows and understands what duties have been assigned to him, as well as to give clear instructions and an algorithm for performing actions.

The above tips will help to form a subordinate's independence and sense of responsibility. Accordingly, such an approach develops in the employee the absolutely necessary problem-solving skill in business.

## **2. Control function in self-management.**

Control over the activities of the organization should be distinguished from control in self-management.

Control as a function of self-management covers the following tasks:

- Comprehension of the physical state. What has been achieved by the time of control?

- Comparison of the planned with the achieved.

- To what extent has the set goal been achieved?

- What deviations occur?

- Correction of established deviations.

- The time, duration and regularity of control depend on the tasks being performed and the set goal.

Carrying out control, the manager needs to check his plans and work organization every day, at regular intervals, asking himself the following questions:

- Are the really necessary tasks being performed?

- Are the decisions regarding the priority of activity tasks always made correctly?

- Is it possible to complete the planned tasks in the set time?

- Is reassignment carried out in a sufficient volume of cases, including urgent ones?

- Are small matters, telephone conversations grouped into a single block?

- Are other opportunities for rationalization and offloading used?

- Is the fight against "obstacles" and "time wasters" carried out?

Types of control:

- Process and activity control;

- Control of results (targeted control).

### **3. Process and result control.**

Process control includes:

- 1) Analysis of activity and time.

- 2) Analysis of daily "obstacles".

Analysis of activities and time in process control can be performed by comparing planned time consumption with actual time.

Ways to control activities and time:

1. Planned time (goal setting) - involves recording category A tasks that the manager could perform if he had 1 hour more time at his disposal every day.

2. Perception of the actual passage of time and activity - involves recording the work periodically performed during the day or week, as well as analyzing the reasons why the plan does not correspond to the fact.

3. Development of the planned state - involves the analysis of each type of activity from the point of view of the possibility of optimizing the labor process in order to save time by taking into account what will happen if this activity is abandoned, or if this activity is fully or partially delegated, or if this activity is carried out during a shorter period of time? At the next stage, activities for implementation and determination of the new planned time should be recorded.

4. Comparison of "plan-fact" (control) - involves determining how significant the actual time load is, how much time can be saved, what time-saving measures can be taken, how the saved time can be used.

Analysis of daily obstacles makes it possible to reveal additional sources of time savings.

Control of results from the point of view of achieving the final goal (target control) should be carried out after the completion of the task (final control). When implementing large projects, control of results



should be carried out at intermediate stages during the entire process (intermediate control).

Control of results includes:

1. Answers to the questions:

- What could be accomplished from the planned tasks/goals?
- What results were achieved?
- What remained undone and why?
- Where was the time wasted?
- What conclusions can be drawn for planning the next period?

2. Compilation of a control sheet in which tasks, deadlines, actual and planned indicators, performance results and reasons for possible deviations are displayed.

A fairly effective method of monitoring results is the method proposed by L. Zivert - the "Five Fingers" method. This method is an elementary mnemonic in which one of the controlled parameters of the quality of achieving the goal is attached to each of the fingers.

### **The "Five Fingers" method (L. Zivert)**

<b>Parameter of the quality of goal achievement</b>	<b>Control questions</b>
<b>L (little finger) dreams, thoughts, knowledge, information</b>	What new did I learn today? What important knowledge did you get? How have my competence and the level of professionalism increased? What new and important ideas "enlightened" me today? Did I learn something new about my time? Did I come up with new "tricks" to better manage my time?
<b>U (unnamed) proximity to the goal</b>	What operational tasks that bring me closer to achieving important (long-term strategic) goals have I fulfilled today? Achieving which goals was insufficient, unsuccessful?
<b>M (medium)</b>	What cases were particularly interesting?

<b>state</b>	What was associated with positive emotions and high motivation? What things were routine, uninteresting, difficult, forced to be done?
<b>I (indicative) service</b>	What achievements in the field of communication and human relations were there today? Who did I help, who did I give a favor in return, with whom did I find a common language, with whom did I work well together? Did I meet new people? Has my relationship with old acquaintances improved? Who was blamed for conflict situations? With whom was the experience of cooperation unsuccessful and due to some reasons?
<b>B (big) cheerfulness</b>	On which tasks did I spend the most energy, physical strength? What made it possible to rest and regain strength? Did I manage my individual energy resources optimally during the day? What have I done today to maintain health and fitness?
<b>F (fist) concentration on the goal</b>	What were my goals for the current day? In what way and by means of which actions did I get closer to the goal?

The "Five Fingers" method is convenient to use, first of all, due to its compactness - it allows you to quickly and qualitatively monitor the most significant results of the day. At the same time, answers to questions related to each criterion can be both extremely short and detailed. Thus, with all its simplicity, the "five fingers" method can be quite a serious analytical tool, the depth of its application depends only on the desire of the control subject.

#### **4. Self-control**

Self-control is a person's awareness and assessment of his/her own actions, mental processes and states. The emergence and development of self-control is determined by society's requirements for human behavior.

The formation of voluntary self-regulation involves the ability of a person to be aware of and control the situation, the process.

Self-control is the process by which a person is able to control his/her behavior in the conditions of conflicting influence of the social environment or his/her own biological mechanisms, in particular, when prone to impulsive urges and strong dependence on external influences.

Among the basic advantages of self-control, the following can be identified:

- gives an opportunity to manage one's actions and emotions;
- gives freedom from external restrictions;
- gives peace of mind, which is based on confidence in one's own strength, abilities and mind;
- provides both an increase in self-esteem and the respect of others;
- gives the ability to manage not only oneself, but also other people;
- gives patience and endurance to overcome internal shortcomings and external obstacles.

The regulatory function of self-control allows a person to solve tasks set independently or suggested by anyone. People who possess the art of self-control are able to perform conscious actions, control the manifestation of their emotions, and, guided by motivation, achieve their own goals or make a personal contribution to the achievement of collective goals.

The main methods of achieving and developing self-control:

1. Adherence to the regime - the development of a person's ability to adhere to a strict regime develops in him the ability to self-control;

2. Family upbringing - an example of parents in restraint, the ability to avoid conflicts in communication inculcates the habit of self-control in children;

3. Self-improvement - constant work on oneself, development of such qualities as punctuality, unconditional fulfillment of assumed obligations teaches self-control;

4. Psychological exercises and trainings - help a person learn to restrain his/her emotions and not allow them to dominate the mind.

#### Questions for self-control

1. What is the essence of the concept of "control" in self-management?

2. What control functions do you know?

3. What types of control do you know?

4. What is process control?

5. How can process control be carried out?

6. What is the essence of activity and time analysis as a control method?

7. What is the essence of the analysis of "daily obstacles" as a method of control?

8. What is the essence of control of results?

9. What is self-control? How can you exercise self-control?

10. What is L. Zivert's "five-finger method"?

## **Topic 6. Resource management of activity and work capacity**



**1. The essence of activity resource and work capacity.**

**2. Methods of resource management of activity and work capacity.**

**3. Psych hygiene and preservation of mental health of the individual.**

### **1. The concept of activity resource and work capacity.**

**Personal activity** is a special type of activity that is distinguished by the intensification of its main characteristics (purposefulness, motivation, awareness, mastery of methods and techniques of actions, emotionality), as well as the presence of such properties as initiative and situationality.

The main types of personality activity (from the point of view of personality structure) are:

- ✓ emotional and psychological;
- ✓ moral;
- ✓ ideological;
- ✓ physical activity.

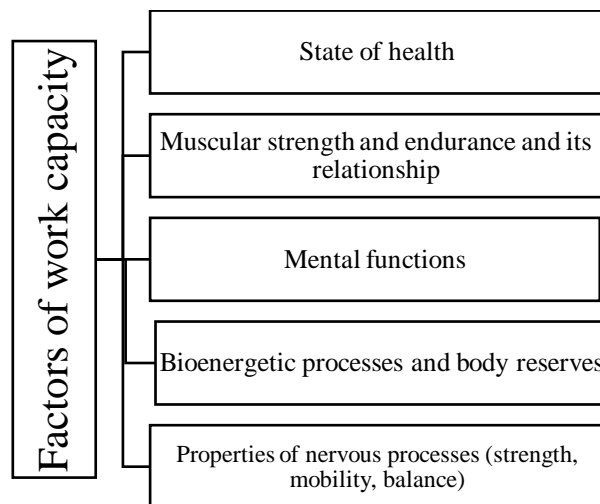
According to the type of personality orientation, physical, mental and social activity are distinguished.

The resource of human activity is a set of personality characteristics and external conditions that allow a person to produce socially significant changes in the world based on the appropriation of the wealth of material and spiritual culture.

Human activity is manifested in creativity, volitional acts, communication, etc. An integral characteristic of personal activity is an active life position of a person, which is expressed in his/her ideological principles, consistency in defending his/her views, unity of word and deed.

Work capacity resource is a set of functional capabilities of the human body necessary to perform specific work.

The general level of working capacity of a specific person as his/her maximum possible psychophysiological potential is determined by the factors shown in fig. 6.1.



**Fig. 6.1. Factors of general working capacity**

In general, working capacity depends on a person's age and gender, socio-economic conditions of life and work.

A distinction is made between physical and mental capacity. The essence and factors of their development are given in the table. 6.1.

Table 3.1

**The essence and factors of the development of physical and mental capacity**

Type of work capacity	Essence	Factors of forming
Physical	A person's ability to perform physical work for a long time	Age, gender, training, environmental factors (temperature, time of day, oxygen content in the air, etc.), functional state of the body
Mental	The ability to perform mental work for a long time	Age, heredity, type of higher nervous activity, environmental factors, sleep quality, chronotype

The general level of work capacity, characteristic of a specific person, is quite stable, and its changes occur slowly and have a long-term nature. In view of this, a distinction is made between full, partial and residual capacity. Full work capacity means a person's ability to work without restrictions, and partial work capacity means a person's ability to work with certain restrictions. Residual work capacity is characteristic of older people and is caused by a decrease in physiological potential due to aging. Its presence allows these people to offer their labor services on the labor market.

General work capacity, which is characterized by physical and mental work capacity and emotional stability of a person, is realized in the work process as professional work capacity.

The efficiency of professional capacity depends on:

- ✓ workloads;
- ✓ conditions of the production environment;
- ✓ professional training and professional suitability for the given type of work;
- ✓ motivation.

All these factors lead to labor stress, that is, an increase in the intensity of physiological and mental processes that ensure professional activity.

The resource of a person's activity is directly related to the resource of his/her work capacity, that is, how well an individual maintains his/her physical form, has an active life position and knows how to protect it, his professional and personal performance results depend on it. Therefore, it is expedient to combine these two resources into one: resource of activity and work capacity is a set of physical capabilities of the human body, characteristics of his/her personality, as well as environmental conditions necessary for effective performance of specific work.

The main factors affecting the resource of activity and working capacity are the physical and emotional health of a person.



Among the most negative factors affecting the resource of activity and work capacity of a modern person should be noted: long-term work at the computer; sedentary lifestyle; emotional exhaustion, stress.

## **2. Methods of resource management of activity and work capacity**

Health is the main indicator of effective resource management of human activity and work capacity.

It is known that human health is determined by 20% genetic predisposition, 20% by environmental factors, 10% by the level of medical care and 50% by a person's lifestyle. It is this direction that should be given considerable attention when solving the problems of restoring and preserving health. The main method of management from the point of view of self-management is maintaining a healthy lifestyle.

A healthy lifestyle involves the formation of the skills of a mature personality, which is characterized by the discipline of the mind, emotions and actions, the ability to bring one's thoughts and feelings into full balance, and the ability to realize oneself as much as possible in the modern world.

The health improvement system should include the following components:

1) improvement of physical form (in full, it should focus attention on your body: its strength, dexterity, flexibility, coordination and your

ability to manage these qualities, the condition of your skin, tendons, joints, hair);

2) rational nutrition;

3) increasing immunity and improving the condition (assessment, condition and work of internal, vegetative organs: digestion, excretion, especially the heart and lungs, as well as the immune system, sense organs, especially the eyes and hearing, as well as speech, which provides communication; here includes the regulation of all the listed components, their coordination);

4) removal of psychological tension;

5) improvement of emotional well-being, which is closely related to mental status, social relations and health, as well as to the development and content of a person's spiritual world.

The lack of movement and the associated lack of muscle activity have a negative effect on the body. 80-90% of the employed population suffer from physical underload. Lack of movement negatively affects the compensatory capacity of the cardiovascular and nervous systems. Most of the diseases of civilization are directly related to the lack of movement. But, daring to engage in physical exercises, it is necessary to remember that exercise is beneficial, and overloading is harmful.

Reasonable movement mode and muscle activity are mandatory for any person in modern society.

Researches conducted in recent years have shown that regular physical exercises allow on average to halve the duration of an employee's temporary incapacity for work, reduce industrial and

household injuries by 10%, reduce the number of conflict situations, and reduce annual economic losses per person. According to scientists, for people who have crossed the border of 45-50 years, physical training is the only possibility to resist natural aging processes.

The implementation of the physical activity program must begin with morning physical exercises, preferably in the fresh air. Their minimum duration is 15 minutes, the maximum is 1 hour, depending on the degree of physical fitness of the person and the recommendations of the physical therapy doctor. Beginners should not force the load, as the body needs time to get into a certain sports shape.

Walking provides a good workout before moving on to more intense loads. It is suitable for any age, has practically no contraindications, is safe and is liked by almost everyone.

Physical culture is sometimes the only way to heal the body and get rid of chronic ailments. Physical education should be started without putting it off until tomorrow. These are morning exercises, industrial gymnastics, walks, tourist hikes, dancing and simply warming up at any free moment.

The next component of a healthy lifestyle is a balanced diet. Such nutrition is considered rational, which ensures the normal vital activity of the organism, a high level of efficiency and resistance to the influence of adverse environmental factors, and the maximum duration of an active life.

When planning one's own rational nutrition, the key parameter is the energy balance. For this, it is necessary to consider own energy costs. They depend on the following factors:

- ✓ gender (among women it is lower by 10%);
- ✓ age (after 30 years energy consumption decreases);
- ✓ physical activity;
- ✓ profession.

For city dwellers, the average energy consumption is 2,200 - 2,400 kcal per day.

The next aspect of a healthy diet is its balance. The biological value of food is determined by its content of essential nutrients necessary for the body: proteins, fats, carbohydrates, vitamins, and mineral salts. For the normal life of a person, it is necessary not only to supply it with an adequate (in accordance with the body's needs) amount of energy and nutrients, but also to observe certain relationships between numerous nutritional factors, each of which has a specific role in metabolism.

A diet characterized by an optimal ratio of nutrients is called balanced. According to the recommendations of the World Health Organization, the best balance for nutrition should be 10-15% proteins, 15-20% fats, 50-75% carbohydrates. In addition, proteins should be 50-60% of animal origin (40-50% - vegetable), fats - 70-80% (20-30% - vegetable). Simple carbohydrates should be no more than 10% of the total carbohydrate content.

The sources of food substances are food products of animal and vegetable origin, which are conventionally grouped into five main groups, forming the "pyramid of rational nutrition":

- ✓ the first group (calcium group) - milk and dairy products (cheeses, “kefir”, sour milk, acidophilin, cream, etc.);
- ✓ the second (iron group) – meat, fish, eggs and products made from them, which are the main source of animal protein and iron;
- ✓ third (group of vitamin A) – vegetables (radish, cabbage, potato, garlic, onion, celery, beetroot, pumpkin, etc.);
- ✓ the fourth (group of vitamin C) – fruit, berries, melon crops (apples, pears, plums, peaches, bananas, lemons, etc.);
- ✓ the fifth - cereal products that are sources of fiber (bread, pasta, cereals);
- ✓ additional food group - spices, tea, coffee and cocoa, sugar, salt, confectionery, butter, fats.

Features of nutrition are often associated with food culture and traditions established in a certain region. They are conditioned by geographical conditions, historical traditions, development of the food industry, standard of living, etc. Their consideration is important when developing a healthy eating plan.

The peculiarities of the nutrition of the population of Ukraine are:

- ✓ high consumption of animal fats compared to vegetable fats;
- ✓ high consumption of simple carbohydrates;
- ✓ sufficient consumption of simple carbohydrates (cereals, potatoes);

- ✓ insufficient consumption of complete protein;
- ✓ deficiency of vitamins A, C, E, folic acid, minerals (calcium, iron), trace elements (iodine, fluorine, selenium, zinc);
- ✓ deficiency of dietary fiber (insufficient consumption of vegetables and fruit).

In order to improve the physical and mental state, vitamin supplements, hardening and phytotherapy should be used.

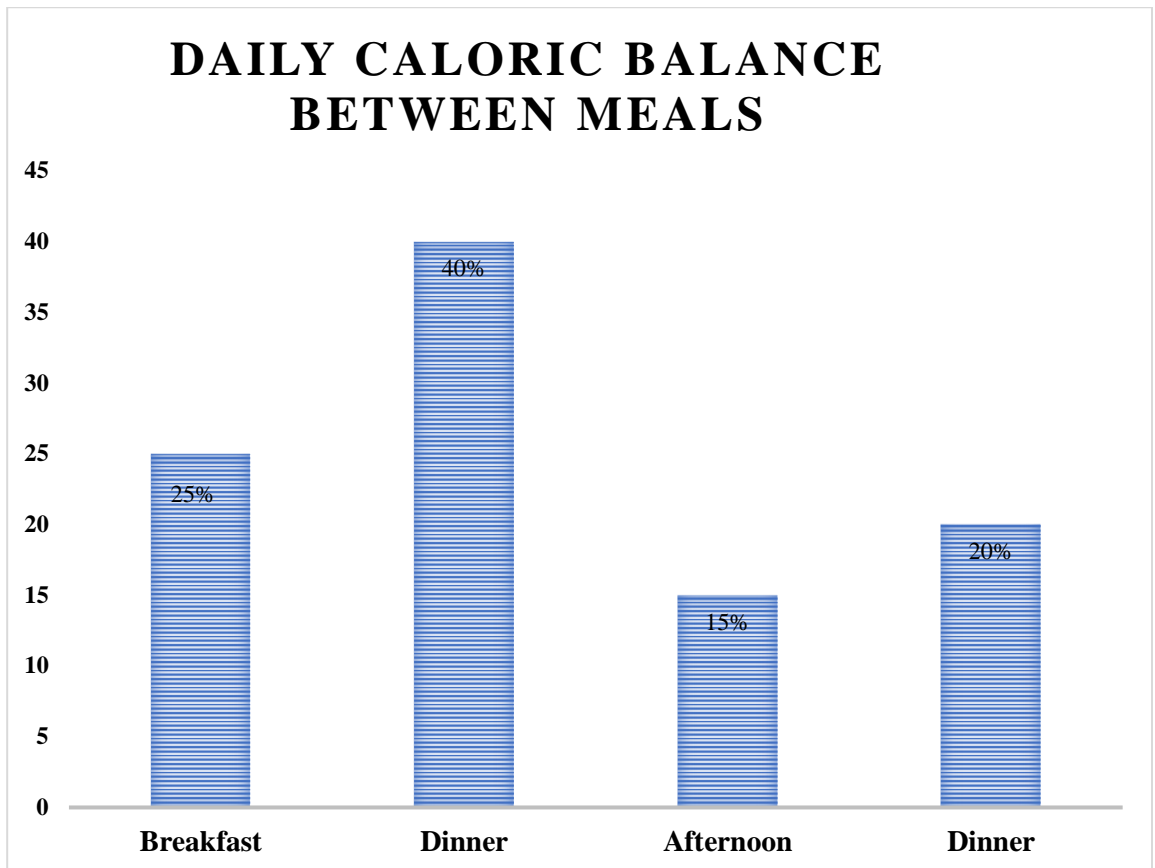
Vitamins and minerals help to prevent diseases and stress, stimulate thinking. The lack of at least one vitamin can cause a decrease in immunity.

One of the main factors of a balanced diet is its variety. Monotonous food quickly gets boring and is less digestible.

The next rule of rational nutrition is its regime. The basic rules are as follows:

- food should be small (3-4 times a day);
- food must be regular (constantly eat at the same time);
- it is necessary to take food at least 2-3 hours before going to bed.

The traditional balance between meals is shown in fig. 6.2.



**Fig. 6.2. Daily caloric balance between meals**

For a balanced diet, one of the main meals is breakfast. It energizes from the very morning and helps to maintain a proper diet for the whole day. Lack of breakfast reduces work capacity and promotes the desire to maintain tone through snacks and light carbohydrates.

Harmful eating habits:

- ✓ overeating;
- ✓ drinking too much water during meals or, on the contrary, not drinking at all;
- ✓ drinking very cold, icy water in general and especially during meals;

- ✓ eating too early or too late;
- ✓ eating heavy food in large quantities or taking light food in very small quantities instead of a full meal;
- ✓ drinking down food with fruit juices or eating fruit together with the main meal;
- ✓ eating without feeling hungry;
- ✓ eating as a means of improving the emotional state;
- ✓ use of products that are incompatible with each other;
- ✓ "snacking" in between meals.

In addition to long-term damage from "irrational" food, food can cause direct damage to health (disease) caused by violation of the rules of safe food:

- ✓ selection of good quality food products;
- ✓ compliance with the rules of food preservation (date, temperature, humidity);
- ✓ compliance with the rules of preservation, pickling of vegetables and fruits;
- ✓ knowledge of optimal methods and hygienic requirements for culinary processing.

Recommendations for a healthy diet:

1. Follow the "rational food pyramid" every day. At the base of the pyramid there is food that should be eaten daily in the maximum amount (your diet should include bread made from coarsely ground flour, porridge, whole grains, and bran). Vegetables and fruits - in large



quantities, dairy products, meat, fish - in moderation, fatty products and sweets - in very small quantities.

2. Try to reduce in your diet: fatty meat, lard; fatty soups (remove the layer of fat before heating); margarine; sweet.

3. Try to minimize: fatty milk, cream, sour cream; fried food; butter; sausages

4. Increase fiber intake (vegetable fiber) to 20-35 g per day. Use fruits, vegetables, salads as much as possible. Add bran to the diet. They can be added to a salad, a side dish for a second course, or added to minced meat or dough. Dried fruits should replace sugar, jam, sweets.

5. Eat whole grains. These are corn, brown rice, oats, wheat, rye, barley. They should be cooked with minimal heat treatment.

6. Take vitamins and minerals in balanced tablets or capsules 1-2 times a day with food at the beginning of a meal. This is especially relevant in winter and spring, when we get fewer vitamins with food.

7. If there are no contraindications, take vitamin E 0.5-1 hour before meals, but not on an empty stomach. You can get a daily dose of vitamin E with food. Control how much vitamin E you get per day. The usual menu does not provide a sufficient amount of vitamin E, so nutritionists recommend sprouted wheat and products containing bran as a food source of vitamin E.

8. Drink water. Every day, drink 6-8 glasses of clean water (tea, coffee, milk, etc. are not counted), namely: a glass of water when you wake up, before breakfast; a glass of water 10 minutes before eating. Do not drink during meals and within 2 hours after meals.

Improving immunity and improving health requires timely monitoring of one's well-being and prevention of diseases.

One of the health maintenance tools that is closely related to physical culture is hardening. Hardening is a system of special training of the body's thermoregulatory processes, which includes procedures aimed at increasing the body's resistance to hypothermia or overheating.

For hardening, such procedures as recreation and playing sports in the fresh air, as well as water procedures (rubbing, dousing, bathing, contrast shower) are widely used. In addition, it is important to gradually and systematically reduce the temperature of water or air, otherwise the situation can be reversed and the disease can be provoked. The main requirement for hardening procedures is daily execution. A break even for 2-3 weeks leads to weakening or complete loss of acquired protective reactions. The first methods of hardening are air baths, rubbing, foot baths.

You can relieve fatigue and increase work capacity by taking adaptogenic plants: ginseng, eleutherococcus, leuzea, Chinese lemongrass, rhodiola rosea (golden root), aralia.

You can use them in different ways: in fresh form - in salads, in the form of juices and tea (lemon), pharmacy tinctures.

In order to relieve psychological tension, the techniques listed in the table are used. 6.2.

Table 6.2

### Methods of relieving psychological tension

Method	Result
Relaxation	In the shortest possible time, relieve tension, restore balance, feel full of strength
Concentration	Learn to focus on what you are doing
Self-training	Learn to manage the work of internal organs and achieve mental and physical relaxation
Meditation	Removal of nervous tension, disconnection of consciousness from internal regulation
Coping	Improve your way of reacting to stress

Improving emotional well-being consists in: prevention of conflicts; struggle with negative emotions; self-discovery, construction and analysis of a model of one's own personality, devoid of internal experiences; achieving goals; strengthening the feeling of confidence in one's own abilities, success.

### 3. Psych hygiene and preservation of mental health of the individual

Nowadays, the achievements of medicine have made it possible to solve a significant part of the problems of physical health, so the problem of mental health is becoming more and more relevant. Traditionally, a person pays little attention to his/her own mental state, and even less often turns to specialists for help. However, the pace of modern life,

constant stress, information overload creates a significant load on the human psyche. The fulfillment of psychohygiene norms allows to partially resolve or reduce the harm from these phenomena.

Psychohygiene is a branch of the science of hygiene, which is responsible for preserving, maintaining and strengthening the mental health of a person. Within the framework of psychohygiene, measures and recommendations have been developed that contribute to the preservation of a person's mental health, the maintenance of mental balance and the normalization of interpersonal and social interaction.

The main factors in maintaining mental health are self-discovery and personal growth, prevention of emotional burnout syndrome, overcoming anxiety, mental tension, and insecurity.

Psych hygiene as a practice is the implementation of health measures, the creation of conditions for the maximally complete preservation of mental health of large groups, small groups and an individual, the implementation of recommendations for strengthening health, increasing psychological stability and subjective well-being of an individual, maintaining human capacity for work. Often it is also a combination of scientific (academic), alternative (for example, "eastern health systems") and intuitive (arising from one's own experience) methods and techniques.

For practical psych hygiene, the task of increasing the psych hygienic competence of an individual is central. Signs of psych hygienic competence of an individual are:

1) sanogenic attitudes, attitude to health as a value (self-value), motivation to preserve health;

2) necessary psychological knowledge, developed skills and abilities to strengthen mental health and reduce the negative consequences of psych trauma;

3) self-development, search and disclosure of self-development potentials, mastering self-regulation techniques and self-control in difficult situations;

4) activity (practical actions) to improve health, change lifestyle in a sanogenic direction and maintain it.

B. Fusel, a specialist in the psychology of influence, notes 3 rules of psych hygiene:

1. "Do not suffer." People often focus on suffering and negative emotions, which only makes the situation worse.

2. "Always be in a good mood." If not in a sublime state, then at least in a calm and comfortable state. This has a positive effect on one's own well-being and allows one to effectively mobilize one's own forces (physical, intellectual and spiritual).

3. "Do not allow overtiredness!". It is important to understand that fatigue is useful, it allows us to mobilize our own efforts and develop. At the same time, overfatigue causes significant deviations from the norm in the human body and psyche. Signs of overtiredness are significant sleep disturbances, the inability to recover one's own strength after a night's sleep, etc.

An important component of the correct way of life of a person in self-management is stress management.

Stress is a physiological and/or psychological tension that arose as a result of exposure to stressors that disturbed the balance. Too long or too severe stress can lead to clinical depression, which requires qualified help from a psychotherapist or psychiatrist. Learning how to manage one's own stress and overcoming its negative consequences is possible through the direction of self-management - stress management.

There are a number of thinking errors that can lead to unnecessarily strong, excessive stress:

1. "Black and white" thinking. The world is seen in black and white tones, without color and halftones. A person thinks in terms of "everything" or "nothing" and considers himself/herself a complete failure at the slightest discrepancy between expectations and reality.

2. Excessive generalizations. A global (and unsubstantiated) conclusion is formulated on the basis of individual facts. The words "never", "nobody", "nothing", "everything", "always" are often used.

3. Catastrophizing. This is a kind of "turning a fly into an elephant". There is an exaggeration of a negative event until it grows in the mind of a person to the extent of a disaster. The words "nightmare", "terrible", "horrible", "tragic", etc. can be used.

4. Subjectivation. Another variant of "turning a fly into an elephant" is when a person is determined on a certain explanation of events and persistently tries to find confirmation of it. If the relevant facts are not

found, "confirmations" are formed from everything that is at hand, in particular from one's own emotions.

5. Excessive pessimism. "The spyglass effect" in which good news is reduced and bad news is exaggerated. A person pays attention only to the negative aspects of life, stubbornly ignoring the positive aspects.

6. Dreaminess and denial of reality. A person is full of colorful, but completely unrealistic expectations about himself/herself, other people, work, profession, the surrounding world, etc. In addition, he/she often does not see the real problem or convinces himself that the problem does not exist, although in fact it is very relevant.

7. Excessive demandingness. A person makes inadequate, inflated demands on himself/herself, other people and the world in general and makes incredible efforts to fulfill these demands. The word "obliged" is often used.

8. Condemnation and labels. A person takes the position of a strict judge and pronounces an imaginary sentence on himself/herself or on another. For example: "I am a loser", "he is a bad person", etc.

9. Hedonistic thinking. This is a mindset that is focused on maximum satisfaction and the complete elimination of suffering and any limitations. Often there are phrases: "I can't stand it", "I need it right now", "it's too hard".

10. "Tough" thinking. A person returns to the same thought again and again until it fills the entire space of consciousness. In addition, each subsequent attempt to solve the problem is less and less successful.

The listed errors of thinking occur from time to time in every person. Their detection and correction are important components of stress management.

Factors that cause and increase stress include: a high level of achievement (striving to achieve a goal, several goals exceeding possibilities, overwhelming workload); envy; pessimism; suspiciousness; loss of loved ones or valuables; anticipation of a threat (failure); permanent stay in risky situations; diseases; anger and conflict; fast rhythm of life or its sudden change; stress from defeat, collapse, failure.

There are three main stress management strategies:

- 1) moving away from the problem;
- 2) changing the problem;
- 3) change of attitude towards the problem.

It is best to overcome stress as soon as it appears, because the longer it lasts, the stronger the negative consequences.

Algorithm of actions during stress:

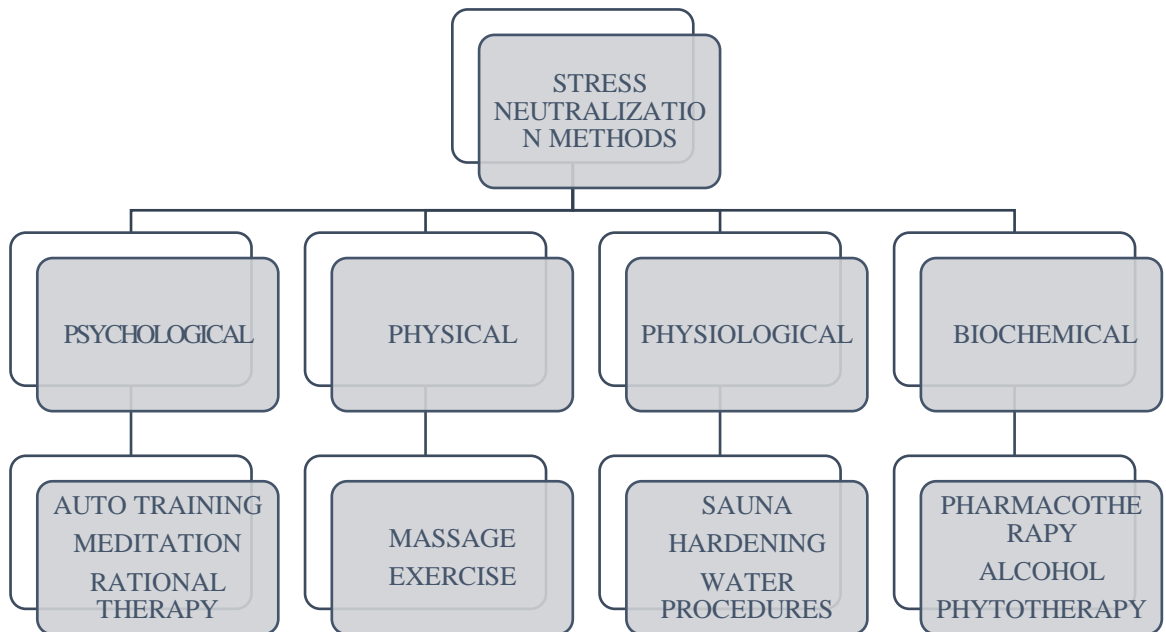
1. Neutralization of excess negative emotions.
2. Formation of self-confidence (self-training).
3. Determining the structure of the stressor ("what should I reconcile with?", "what can I find a positive moment in?", "what should I change in this situation?").
4. Search for resources ("which ones already exist?", "which ones need to be obtained and how?").
5. Drawing up a plan for the near future.



## 6. Start implementing the plan.

One of the more important aspects is the search for resources to solve a stressful situation. Such resources can be: states (calmness, self-confidence); qualities (perseverance, persistence); beliefs ("I have the right to make mistakes"); abilities (ability to choose friends, ability to convince the interlocutor); knowledge.

Stress neutralization methods are shown in fig. 6.3.



**Fig. 6.3. Methods of stress neutralization**

One of the consequences of constant stress is professional (emotional) burnout, i.e. a syndrome that develops against the

background of chronic stress and leads to the depletion of emotional, energetic and personal resources of a working person.

The syndrome of emotional burnout has the following manifestations: feelings of indifference, emotional exhaustion, physical exhaustion (a person cannot devote himself to work as before); dehumanization (development of a negative attitude towards colleagues and clients); negative self-perception in professional terms (feeling of insufficient professional skill).

Physical symptoms are: sharp increase in fatigue; chronic fatigue; headache; sensitivity to changes in the external environment; change in blood pressure; asthenia (weakness, weakness); restriction of movement in the neck, back pain; involuntary movements - clenching of fists, stiffness; weight gain or loss; dyspnea; insomnia; sexual dysfunction.

Emotional symptoms include: pessimism; cynicism; obduracy; indifference; aggressiveness; irritability; anxiety; guilt

Behavioral symptoms: desire to rest; indifference to food; justifying the consumption of tobacco, alcohol, and drugs.

Social symptoms: low social activity; decrease in interest in leisure time, hobbies; social contacts are limited to the workplace; minor relationships at work and at home.

Intellectual symptoms include a decline in interest in new ideas, theories, and alternative approaches to work.

The main approaches to solving professional burnout:

1. Self-care and stress reduction. This can be done by striving for balance and harmony, a healthy way of life, satisfying the need for

communication, the ability to distract yourself from work-related experiences, learning self-regulation skills (managing your psycho-emotional state, which is achieved by influencing a person on himself with the help of words, imaginary images, control of muscle tone and breathing).

2. Transformation of negative beliefs, feelings of despair, loss of meaning and hopelessness. For this, it is necessary to find meaning in everything (both in important life events and in ordinary, everyday ones), and strive to fight against one's own negative beliefs.

3. Increasing the level of professional skill.

### **Conclusions**

The resource of activity and work capacity is a set of physical capabilities of the human body, characteristics of his personality, as well as environmental conditions necessary for effective performance of specific work. The main factors affecting the resource of activity and work capacity are the physical and emotional health of a person. In our time, the negative factors that most affect the resource of activity and work capacity of a modern person are: long-term work at the computer; sedentary lifestyle; emotional exhaustion, stress.

Health is the main indicator of effective resource management of human activity and working capacity. A healthy lifestyle involves the formation of the skills of a mature personality, which is characterized by the discipline of the mind, emotions and actions, the ability to bring one's thoughts and feelings into full balance, and the ability to realize oneself as much as possible in the modern world. The health improvement

system should include the following components: physical fitness improvement; rational nutrition; increasing immunity and improving the condition; removal of psychological tension; improvement of emotional well-being, which is closely related to mental status, social relations and health, as well as to the development and content of a person's spiritual world.

The pace of modern life, constant stress, information overload creates a significant load on the human psyche. The fulfillment of psych hygiene norms allows to partially resolve or reduce the harm from these phenomena. Psych hygiene is a branch of the science of hygiene, which is responsible for preserving, maintaining and strengthening the mental health of a person. Within the framework of psych hygiene, measures and recommendations have been developed that contribute to the preservation of a person's mental health, the maintenance of mental balance and the normalization of interpersonal and social interaction.

The main factors in maintaining mental health are self-knowledge and personal growth, prevention of emotional burnout syndrome, overcoming anxiety, mental tension, and insecurity.

The syndrome of emotional burnout is a negative emotional state that occurs against the background of chronic stress and leads to the exhaustion of the emotional, energetic and personal resources of a working person. It is especially dangerous for all people whose professions are related to working with people. Means of prevention and overcoming emotional burnout syndrome include reducing the level of

stress, overcoming negativism and increasing the level of professional skills and increasing motivation to work.

The management of the resource of activity and work capacity consists in assessing the existing potential of human activity and work capacity, developing a program of physical training, forming the skills of rational nutrition, getting rid of bad habits, teaching the basics of self-regulation, prevention and combating stress, and monitoring results.

## Topic 7. Solvency resource management



1. Concept of solvency resource.
2. Methods of managing the solvency resource.

### 1. Concept of solvency resource

**Solvency** is an objective indicator of a person's financial condition, the ability to make timely payments for all types of obligations. Financial means are not the main life goal for every person, but their importance cannot be overestimated. If we strive for the full disclosure of our potential, then money is the most important system that ensures our development:

- ✓ allows us to finance our projects, ideas, training and development with own or borrowed funds; provides a comfortable internal state;
- ✓ eliminates monotonous work for hire, allowing you to open your own business or find a more interesting job.

Financial problems arise in almost all people, regardless of the level of wealth. At a certain stage, we conclude that the money situation must be under control. This can only be achieved through financial planning.

Personal financial planning is the preparation of a financial plan for one person or a family, which reflects the current financial situation, personal financial goals and means of achieving them.

In order to ensure the normal life of the family, it is necessary to have appropriate sources of income. In addition, an important issue is the formation of the income part of the family budget, the classification of family incomes and the determination of sources of their receipt, as well as the forecasting of these incomes for the future.

Family income is the sum total of cash and material income received by the family during a certain period of time (week, month, quarter, year).

Depending on the regularity of receipt, family income is divided into four categories: income from current activities, income from assets, social and other income.

The first group of income - income from current activities - includes all income that family members earn in the process of applying their labor at the main and additional places of work or from the family business (wages at the main and additional places of work, bonuses, allowances, as well as income from running a subsidiary farm and own business). In most cases, income from current labor accounts for the majority of family income. That is why it is important that family members have a place of work that is a source of such income.

The second group of total family income - income from assets - should include those incomes that family members receive without any intervention and use of their own labor power, etc. A person receives such income regardless of whether he/she works or does not work. This includes income from leasing property, income from investments on the financial market (investments in shares, corporate bonds, domestic

government loan bonds, bank certificates of deposit and other securities), interest on deposits, etc. In order to receive such income, the family or its individual members must own relevant assets that act as sources of income such as: real estate, vehicles, deposits in banks and non-bank financial institutions, investments in securities and other financial market assets, copyrights or certificates, patents for inventions that are transferred to other economic entities for temporary use, etc. One of the types of income from assets is an accumulated private pension.

The third group of incomes is social incomes (solidarity pensions, subsidies, benefits, scholarships and other social benefits). Such cash income is received by citizens to provide for their own needs, which arose in connection to certain events or circumstances (for example, illness, unemployment, loss of work capacity, retirement, obtaining education, the birth of a child, and other family circumstances). In most cases, their volumes are too small to ensure a normal standard of living on these incomes. Those family members who belong to certain social categories receive such incomes: students, pensioners, disabled people, parents of large families, war and labor veterans.

The peculiarity of the fourth group of incomes - other incomes - is that they are mainly of a one-time or occasional nature and in most cases do not significantly affect the family budget. Although in some cases their influence can be significant (receiving an inheritance, a significant copyright fee or winning a lottery, etc.). This group includes money borrowed, loans received from banks and other financial institutions (financial companies, credit unions); borrowed funds and other material



assets from relatives, friends, acquaintances; negative balance on the card account (as a result of the purchase of goods for an amount exceeding the balance). At the time of receipt of such funds, they should be classified as family income, but during the repayment of such debts and interest on them, they are classified as family expenses.

According to the order of receipt, family income will be divided into two groups: permanent (recurring) and one-time (non-recurring). The family receives regular income at regular intervals - (salary, income from entrepreneurship, pensions, scholarships, subsidies, interest on deposits, income from the subsidiary farm (including the sale of agricultural products), dividends on shares. Accordingly, one-time incomes are non-recurring or occasional in nature (prizes, inheritance, royalties, gifts, cash assistance, lottery winnings, etc.).

In order for the family to be able to exist normally, expenses of a current nature (food, clothes, shoes), expenses for durable goods (furniture, household appliances, cars), as well as expenses for relevant services (education, treatment, satisfaction of spiritual needs) are necessary needs, etc.

Family expenses are a set of payments made by family members in order to ensure their livelihood, which include expenses for the purchase of food and non-food goods and payment for services, expenses for investments (investments in real estate, deposits, shares, bonds, etc.), taxes, property and other payments made.

Therefore, the causes of expenses in the family are the corresponding needs (the need for the corresponding goods and services, the desire to have them, or the feeling of their lack).

The following needs of families can be identified:

✓ needs of a material nature (needs for food, clothing and housing). It should be remembered that these needs are the main (priority) both for the whole family and for each of its members in particular. These are needs without which no person can live;

✓ needs of a spiritual nature (needs to visit museums, exhibitions, libraries, cinemas, concerts, religious needs). These needs contribute to the spiritual enrichment of a person and the development of his creative potential; needs of a social nature (needs to spend on philanthropy and sponsorship, pay relevant taxes and mandatory payments); needs in services (use of transport, communal services, preservation of health and treatment, visiting sports sections, education, kindergarten services);

✓ needs for running a personal farm (purchase of fertilizers, farm animals, seeds, seedlings, construction of farm premises, etc.);

✓ other needs.

All these needs require the family or its individual members to make appropriate expenditures in order to satisfy them. The amount of these expenses depends on the amount of income, age, place of residence, composition of the family, nature of its needs, traditions and lifestyle, and other factors.

Expenses of the family economy are distributed according to the following characteristics:

✓ according to the nature of occurrence: expected - expenses that the family intends to make at the appropriate moment in time or with a certain frequency (for example, paying for utilities, education, food); unforeseen (accidental) – expenses that the family did not intend to make, that is, expenses that arose spontaneously (for example, expenses for repairing a house that was damaged as a result of a natural disaster);

✓ according to the form of implementation: cash - expenses that require cash payments - both cash and non-cash; non-monetary - expenses that do not involve making monetary payments, and their volume is determined by the value of those things, items and food products that are given as help or gifts to relatives, acquaintances and other persons;

✓ by periodicity: permanent expenses – expenses that the family incurs constantly, both at the present time and in the future (costs for clothing, food, payment of utilities, etc.); temporary expenses – expenses that may disappear in the future (payment for kindergarten services, tuition fees, etc.);

✓ according to the possibility of consumption: consumer expenses are the expenses of the family and its individual members for the purchase of food, alcoholic and tobacco products, non-food products, for the payment of communal services, clothes and shoes, furniture, household items, household appliances, goods for daily use housing maintenance, expenses for health care, transport, communication,

recreation and culture, education, etc. This group additionally includes: the cost of food products consumed by family members, obtained from a personal auxiliary farm, in the order of self-procurement or donated by relatives and other persons; the cost of purchased food products, for feeding pets and non-food products for them. All these expenses of the family are consumer, regardless of the place of their implementation (in a trade network, from the company, organization, in the market or in individual citizens); non-consumer - include expenses related to running a personal subsidiary farm (purchase of seeds, fertilizers, agricultural remains, etc.), monetary and non-monetary assistance to relatives and other persons, expenses for the purchase of real estate, for the construction and capital repair of housing and farm buildings, for the purchase shares, certificates, currency, deposits to banking institutions, alimony, mandatory taxes (except income tax), fees and contributions, debts returned by the family, as well as other monetary expenses not mentioned earlier;

✓ according to the order of execution: primary - expenses that must be incurred first to ensure the existence of the family (expenses for accommodation, food, treatment, etc.); secondary - expenses without which a person or family can maintain their livelihood (expenses for investments, expenses for entertainment and recreation, purchase of a car, yacht, products made of precious metals and stones, and other luxury items);

✓ by types: current expenses - made by each family in order to constantly support its life activities. This group includes expenses for

food, clothes and shoes, furniture, living expenses (if the family does not own residential real estate), expenses for using public transport and private transportation, expenses for recreation and spending free time, hobbies and other interests, expenses for treatment and recovery, visiting sports sections, expenses for telecommunications, expenses for obtaining an education and attending various educational courses, as well as expenses that are associated with the satisfaction of a person's spiritual needs, and expenses of a current nature that are associated with running auxiliary farm and maintenance of pets. Every person has such expenses, regardless of whether he/she owns any property or whether he has debts.

Next category of expenses is expenses on assets, that is, on the maintenance of household property. The category of expenses for assets includes: expenses for the purchase of real estate, for their repair and maintenance; expenses for the purchase of a car and its maintenance; expenses for running one's own business, as well as running and developing an auxiliary farm; expenses related to the investment of funds (investing in deposit accounts in banks and non-bank financial institutions, in securities, real estate, precious metals, objects of art and other valuables), expenses for the services of a financial consultant and companies that perform qualified investment management families; maintenance costs of deposit accounts; expenses for accumulative and non-state pension insurance; expenses for insurance of assets and life of family members. Expenses on assets, if possible, should not exceed income from assets, because otherwise the meaning of the content of

such assets is lost. Therefore, the analysis of these costs should be carried out in comparison with income from assets.

Next category of expenses is expenses for loans and debts. This category includes: expenses for loans - mortgage, car loans, other loans to citizens (for recreation, education, treatment, other purposes); credit card payment expenses; expenses for repaying interest-free loans (borrowed from colleagues, friends, relatives).

The last category of expenses is social expenses, which include: expenses for philanthropy and charity, expenses for paying tax payments (except personal income tax), fines, penalties, etc.

## **2. Methods of managing the solvency resource**

Effective management of one's own finances involves:

- ✓ higher earnings, ensuring a decent life for yourself and your family;
- ✓ less unnecessary expenses; creating savings and receiving additional income from them;
- ✓ saving money for your financial goals and for your future old age and/or financial independence.

When planning your own finances, it is advisable to follow certain principles:

1. Control of all financial flows - it is necessary to keep strict records of all finances that pass through your hands.

2. Personal financial planning. The first step to managing personal finances is drawing up a financial plan, which includes such important components as assessing available and necessary resources, setting financial goals, sequencing and calculating their achievement.

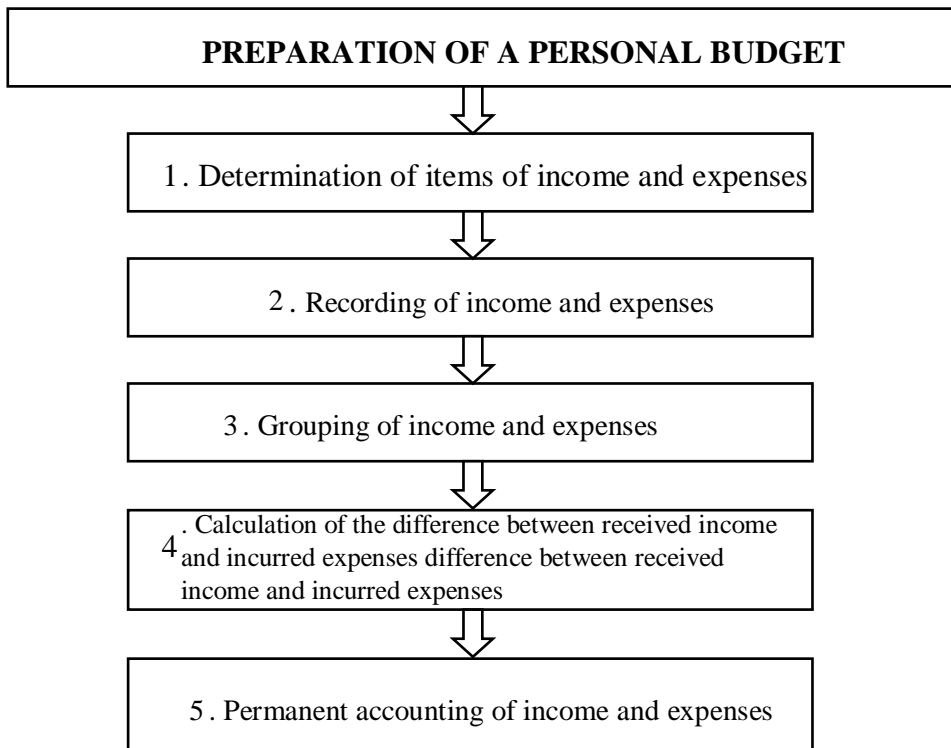
3. Priority when spending. The structure and prioritization of costs are important for the effectiveness of their use.

4. Creation of accumulations. There should always be a positive difference between income and expenses - accumulation.

5. Making investments. Money should work for you. They should be allocated between different types of investment instruments, considering your goals, opportunities and attitude to risks.

6. Risk insurance. Insurance against risks that are dangerous for your financial plan is an important financial mechanism for preserving and protecting the achieved level of well-being.

The main tool for controlling one's own finances is the creation of a personal budget. Its results are shown in fig. 7.1.



**Fig. 7.1. Stages of drawing up a personal budget**

The income structure can look like this:

1. Periodic income:

- ✓ monthly income (salary, bonuses, deposit interest, stipend, alimony, etc.);

- ✓ annual income (annual bonus, health benefits, etc.).

2. One-time (other) income.

The cost structure is similar:

1. Periodic expenses:

- ✓ monthly expenses (utility payments, telephone bills, car maintenance, kindergartens, clubs, etc.);

- ✓ annual expenses (vacation, insurance, etc.).



## 2. One-time (other) expenses.

Recording and grouping of received income and expenses makes it possible to compare them. If for a period of time (month, year) the expenses turned out to be less than the income, it means that free funds appeared, which indicates a correct assessment of one's financial capabilities. If during the same period of time expenses turned out to be more than income, it means that a debt was formed.

In such a situation, one should think about the causes of this phenomenon. Perhaps it is necessary to restrain one's own needs to a greater extent or to think about the rationality of the cost structure.

Recording (accounting) of income and expenses and their comparison (analysis) is reasonable to carry out for a long time, at least one to three months. In addition, you should not go to the extremes of "super-detailed" accounting - in many cases, time is more important than small things. Those expenses and incomes that have a certain weight in the budget deserve special attention.

Continuous accounting and control of income and expenses helps to prepare in time and painlessly cope with a change in the situation.

The cost accounting system and the related cost planning system are individual in nature and can be built by everyone at their own discretion and for the convenience of further use.

The main goal is to control financial flows, find reserves to increase income and ensure the desired standard of living. This analysis allows you to correctly plan expenses in accordance with the received income.

The most important task of personal financial planning is to understand where money comes from, as well as where it is spent. One of the most important signs of a well-off person is independence from the financial results of work.

You can keep records in any way you like: on paper, in an Excel table or in a specialized program. In such programs, it is convenient to consider and analyze data, so let's turn to the software available on the market. Conventionally, programs can be divided into two groups: with standard functionality that allows you to consider data and analyze it, and with advanced functionality that includes budgeting.

The main functions of programs with standard functionality:

- ✓ maintaining directories, in particular working with currency;
- ✓ keeping accounts;
- ✓ management of income and expenditure operations;
- ✓ data analysis - reports, filters, charts.

Programs with advanced functionality also include these functions and, in addition, allow you to work with budgets. The following is a small list of free programs that you can use when planning your personal finances:

1. Personal Finances. A feature of the Personal Finances program can be considered simplicity for beginners and a variety of settings for experienced users. All transactions can be categorized by family members and other parameters. Thanks to convenient filters and sorting, you will always find the information you need. Frequently recurring

transactions can be entered with a single click without having to re-enter all the data.

The program is able to consider debts, loan payments. Data entry does not take much time, exchange rates are automatically downloaded from the Internet, it is possible to keep accounts of different currencies and make conversions between them. There is a planner of income and expenses. Data from the database can be exported, imported or synchronized.

2. Family Accounting 1.3. The program allows you to easily add all items of expenses and income to the database. You can analyze cash flows with the help of visual graphs and detailed reports, which will allow you to determine where the most money goes, which brings the most income to the family, etc.

It is possible to plan the budget. You can even analyze plans alongside income and expenses that have already occurred. The program also allows you to consider money borrowed or lent. Several electronic wallets, different currencies are supported. Several users can work with the program, and data can be easily protected with a password. The database is imported into Excel or OpenOffice files. It is possible to make backup copies of data and restore them without any problems.

3. CashFly 2.0.4.6. It has an excellent set of functions. It is suitable not only for accounting of personal and family finances, but also for calculating the accounting of a small company. In addition to the standard tools, it includes a built-in notebook with birthday reminders, a personal diary, etc.

A tree-like structure of income and expenses will help organize information and more accurately estimate cash flows. Visual graphs and charts will also help with this. The results can also be printed. The program supports password protection. This is especially true if the computer is used by outsiders.

Many accounts, different currencies, debt accounting - all this will help you plan your finances easily. In addition, it is not necessary to completely fill out all forms and use all functions. Everything unnecessary can be turned off, and only the most necessary data can be entered.

4. Money Accounting Free 3.2.0.0. The program is very simple and convenient, does not require installation, can be run from a flash drive. The program allows you to keep records of finances in different currencies. Consider the storage of funds in different places (accounts).

5. HomeBank 5.0.9. It is convenient to work and manage transactions in HomeBank. The program allows you to organize them by dividing them into categories, schedule transactions for automatic entry into the database (for example, daily bills), add tags and much more. The program also has the function of simultaneous editing of several fields, which can significantly speed up and simplify the process.

With its help, you can also plan and analyze the family budget. You can set a monthly or yearly budget for each category. HomeBank provides tools for financial analysis and reporting. The program can generate dynamic reports that reflect the current state of the family

budget. It is possible to filter transactions and flexibly adjust report parameters. The HomeBank program can build charts based on the data.

In addition to cash flow analysis, it is necessary to forecast cash flows. Forecasting comes down to building budgets in the planned period. Depending on the set goals, the budget can be drawn up for different periods: month, quarter, year. Monthly planning is the most common. It is followed by annual planning.

Structuring existing income, finding new sources of income, planning future income, and taking all necessary measures to increase cost efficiency will help to achieve financial independence.

Competent implementation of own expenses is the basis of building financial independence. The key positions are the structure and efficiency of costs. The cost structure characterizes what the funds are spent on. An important aspect is the prioritization of expenses for certain areas of activity (especially in conditions of their limitation).

D. Eisenhower 's matrix can be used to determine the priority of spending. According to it, four quadrants are built: urgent and important; not urgent, but important; urgent and not important; not urgent and not important.

Urgent and important. These costs have a serious impact on life, so we consider them first. To prevent this from happening, we have to pay these bills every month. This group includes essential products, payment of utilities, loans, etc. That is, these are expenses necessary for current activities.

Not urgent, but important. This includes all expenses that are very important both now and, in the future, but we can do without them in a pinch. This group includes savings, investments, education expenses, etc. These are expenses that are strategic in nature or closely related to our goals.

Urgent and not important. This includes all unforeseen expenses that need to be done urgently. That is, unexpected expenses received as a result of unforeseen events. This group includes expenses for treatment of diseases, repair or replacement of damaged items, etc. This group of expenses is unpredictable, but a certain "reserve" is usually left for it.

Not urgent and not important. These are expenses without which we can do not enduring significant inconvenience. This includes luxury (or prestigious) goods, spending on entertainment, recreation, and spontaneous purchases.

In addition to D. Eisenhower's matrix, you can use the 60% rule (R. Jenkins). Within the framework of the method, it is proposed to divide the entire total income into 5 parts:

1. Current expenses – 60%. For example, food, utilities, transport, clothing, household goods, cosmetics, etc.

2. Pension (investment) savings - 10%. Savings "for old age" or to ensure investment income.

3. Long-term purchases and payments - 10%. Savings for big purchases (car, repairs). It can also be used to pay current debts.

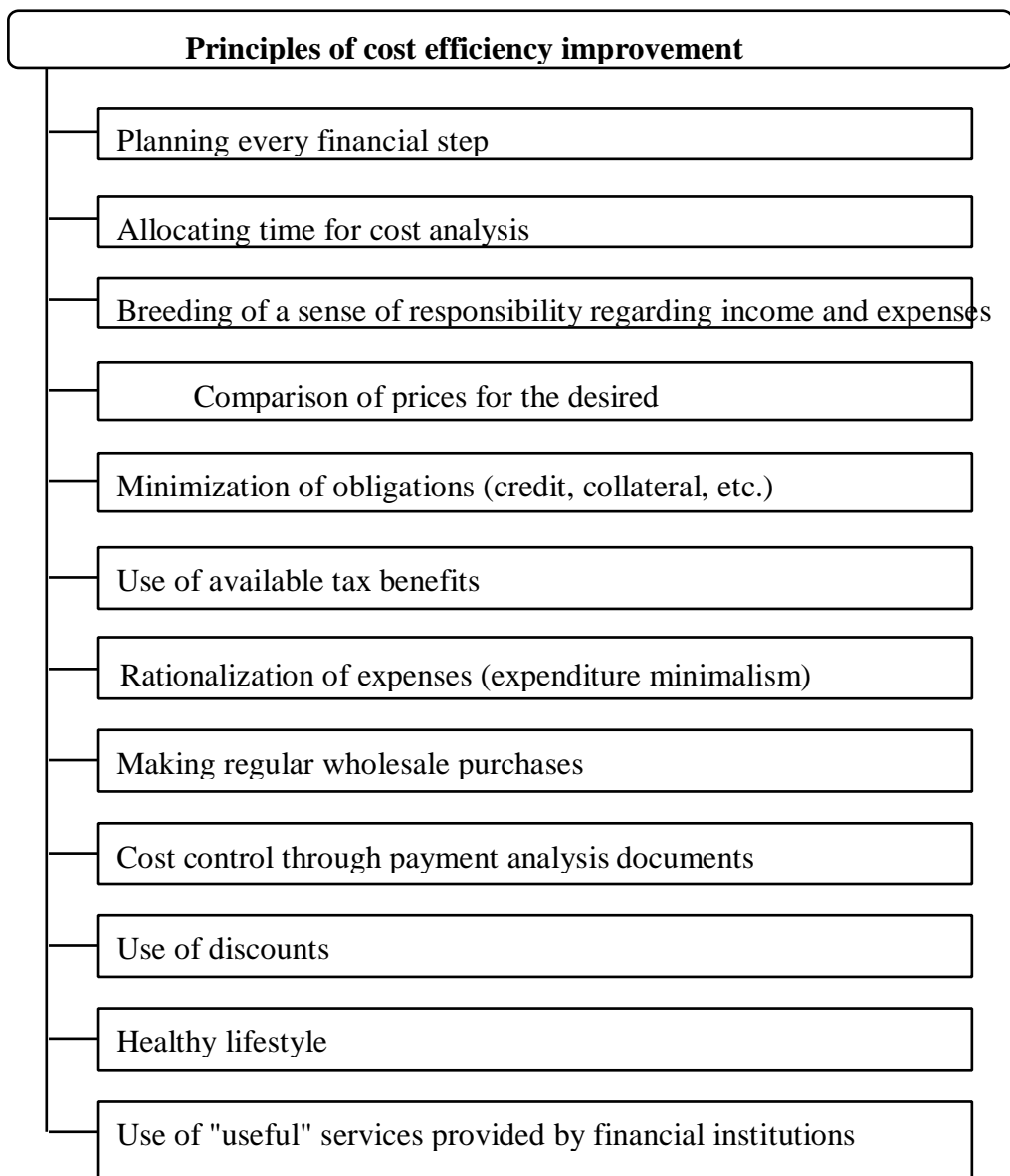
4. Irregular expenses – 10%. Money for non-regular expenses can be used, for example, for car repairs, treatment of a sore tooth, anniversary gifts for parents, a new washing machine, etc.

5. Entertainment - 10%.

According to other approaches ("50-30-20"), when drawing up the expenditure part of the budget, it is suggested to attribute 50% to current expenses, 30% to providing for one's own desires, and 20% to savings.

The structure of expenses is very individual and largely depends on the character of a person, his income, habits, cultural traditions, place of residence, etc. Therefore, the ratio between different items of expenses can differ significantly for different people, but the main thing is to determine the most suitable structure for yourself, which should consist of all basic components (current expenses, development expenses, savings, etc.).

Several basic principles of increasing the efficiency of your costs are shown in fig. 7.2.



**Fig. 7.2. Principles of increasing the efficiency of your costs**

Next step in financial planning is the competent accumulation of funds for various purposes.

A clear definition of the goal is one of the most reliable methods of optimizing any decision. It is clear that there are always several goals, and the solution to a difficult task can be the effective distribution of



funds between the selected goals. Defining and ranking goals also greatly simplifies the task. The set goal is already a large part of the solution to any problem.

After setting goals, it is necessary to begin their achievement, using in the process the rules of accumulation (Table 7.1).

Table 7.1

Accumulation rules

<b>Rules</b>	<b>Essence</b>
Drawing up a financial plan	Based on the analysis of expenses incurred / income received, it is necessary to determine the amount remaining for financing strategic goals
Separation of savings from the rest money	It is necessary to determine the amount of money that can be saved. You can start with a small part of the total income, gradually increasing both the income and the percentage. Unexpected money - a lottery win, a birthday gift or a bonus at work - should be transferred to a savings fund
Accumulation when possible	It is recommended to start saving with a small amount, gradually increasing it, and part of the accumulated income should not cause serious damage to the personal or family budget
Complication of expenses, facilitation of accumulation	It is necessary to build a system in which it would be easy to save money, but difficult to spend it. For this, the following principles can be applied: the principle of dividing money (dividing the received income into several amounts: one amount is for food, the other is for utility costs, etc.); the principle of non-cash savings (part of the income is transferred to a bank account where money is deposited)

Training in saving money	The ability to save, like any skill, requires mastery and some effort to maintain it
Minimum savings - maximum savings	Accumulations should not appear at the expense of total savings on everything at the risk of one's own health and the health of loved ones, but at the expense of reasonable planning of expenses and saving of unspent funds

Next steps are the creation of investments and risk insurance. They are closely related, as their main goal is to use their own savings for their preservation and income.

When carrying out the process of financial planning, you should also remember to protect your own finances.

Although it is impossible to predict the future, it is possible and necessary to consider the probability of a crisis situation in your own financial plan. Personal financial risk management is a solid foundation for preparing for possible crises. For the successful implementation of personal financial risk management, first of all, it is appropriate to think about the following questions:

- ✓ creating a reserve;
- ✓ diversification of risks; concern about liquidity;
- ✓ insurance.

A personal (family) reserve is a sum of money formed in case of unforeseen circumstances. The reserve must have the following characteristics: liquidity (ability to quickly turn into cash). According to this principle, the best reserve should be in the form of cash, money on

a bank card, bank deposit, etc.; the size of the reserve is the amount of 3-6 months' expenses.

Diversification of risks consists includes distribution of savings among different "baskets", for example, among different types of currencies, at the time of crisis, the risk of loss of savings will be appropriately "distributed" between these "baskets".

A feature of any crisis is low predictability of the development of events. Investing money during a crisis in real estate, gold/jewelry and durables can lead to additional risks. Such items are not very liquid in a crisis - it is difficult to quickly sell them and get cash, and the amount received will usually be less than what it was before the purchase.

Insurance is a system of economic relations regarding the protection of the property interests of individuals and legal entities in the event of the occurrence of certain events (insurance cases) at the expense of monetary funds formed by paying insurance premiums.

Any risk can be insured. The list of insurable risks is huge. To ensure financial security, everyone should think about life and health insurance, medical insurance, property and liability insurance.

Crisis situations (personal or national) are the strongest test of one's financial security. In such situations, people often make mistakes that nullify all their efforts to manage their own finances. Therefore, there is a list of principles of personal crisis behavior that will allow you to avoid mistakes and survive a crisis situation with minimal damage:

1. "No panic." The perception of a crisis situation is positively influenced by patience, a positive attitude, and sobriety of reasoning. You should analyze any incoming information without panic.

2. Reduction of costs for non-essential goods. To minimize risks during a crisis, it is better to refuse large purchases (unless, of course, it is a matter of absolute necessity) and save money as much as possible to ensure financial security.

3. Search for additional sources of income. Studying the tax legislation in order to find the possibility of obtaining a tax benefit, studying the labor market in order to find extra income and other ways of increasing income, as much as possible in the current situation, can help survive the crisis with minimal losses.

There is no universal recipe for how to save your money from crisis phenomena. You can save and increase your savings both in calm times and in periods of upheaval. There are many different options for investing money, let's consider the most popular:

1. Saving money at home. The easiest way to accumulate money is often not considered a means of investing money at all, since it requires almost no effort.

Benefits. Quick access to cash, transparency of own savings.

Disadvantages There is a high probability of losing all the money (insecurity from being robbed, etc.), the amount kept at home is constantly decreasing (the inflation rate devalues the accumulated funds), it is psychologically much more difficult to keep money at home

than in the bank (it is difficult for many people to refrain from reckless losses if the money for them is easily available).

Recommendations. It makes sense to work only to ensure current expenses or save funds for unforeseen situations. In both cases, the amount of accumulation should not be very large (usually it does not exceed one month's income).

2. Investing in currency. It is also a fairly simple and popular tool that somewhat alleviates the problem of simply keeping money at home.

Benefits. High liquidity and reliability of freely convertible currencies (the currencies used are quite easy to exchange, in addition, the rate of their depreciation is very low).

Disadvantages A bank commission must be paid for the purchase of currency; currency lying at home in a cozy place does not bring profit to its owner; currency unpredictability (there are currency risks of significant changes in the value of currencies).

Recommendations. Dividing money into parts (hryvnias, dollars and euros or into another combination of currencies) can save money from devaluation, as it divides possible risks. In addition, certain efforts required for currency conversion can partially avoid the psychological urge to spend.

3. Bank deposits. This method involves depositing money in banks on deposit accounts.

Benefits. Protection against inflation (the interest rate compensates for inflation), growth, a relatively high degree of reliability (deposits of citizens are insured by the state).

**Disadvantages** Very small rates (the income barely covers the level of inflation. A large percentage is associated with increased risk (most often caused by the urgent need of the bank to replenish its resources), there is no quick access to money. Loss of interest during early withdrawal. Reliability of banks can vary significantly.

**Recommendations.** In times of crisis, a bank deposit is the least risky investment. At the bank, a citizen can receive interest on a deposit comparable to the real level of inflation. If the contribution is placed in a bank connected to the deposit insurance system, the risk of its loss is minimized.

4. Investing in real estate. Buying real estate with the goal of generating income from it (renting it out or potentially reselling it after the price rises).

**Benefits.** Investments in real estate are reliable, and their prices cannot fall critically. In the long term, real estate values usually increase. Real estate primarily generates rental income. Often, when buying real estate for the first time, you can get benefits (depending on the legislation). Buying real estate at a minimum price allows you to make good money in the long run.

**Disadvantages** A relatively large initial capital is required, relatively low liquidity (it is very difficult to get the full value of the asset quickly). The owner of the real estate bears the costs of its maintenance (real estate, especially residential real estate, requires significant maintenance costs). The value of real estate is often unjustifiably overestimated and depends on the speculative component (many people

use real estate as a means of investing money and expect its price to rise, thus heating up demand and prices for it, which in case of significant "overheating" can lead to a sharp drop in prices). Significant risk when investing in real estate at the construction stage (real estate at this stage is relatively cheap, especially given the potential price appreciation, but the risks with unscrupulous builders or crisis phenomena in the economy increase).

Recommendations. This investment option is appropriate as a long-term investment. Its disadvantage is that, if necessary, it will not be possible to sell the property at the purchase price quickly. At the same time, real estate can provide a stable rental income. For investment, you should buy real estate that is easy to rent (one- and two-room apartments) in areas where its value will increase. During the sale of real estate, it is advisable to carry out repairs in it, which can significantly increase its value.

5. Investing in land plots. In terms of its advantages and disadvantages, this tool is similar to investing in real estate. However, it has its own specifics - it is quite difficult to increase the value of a land plot, a complex system of legal support, when buying, it is important to choose the best land plot for the appropriate "price-quality" ratio.

6. Stock market. This method involves the purchase of securities on the stock market (shares, bonds).

Benefits. Shares of the largest corporations, thanks to their absolute liquidity, will be able to "enrich" the investor. They are always easy to sell, returning them to a cash equivalent. The purchase of shares

ensures that the investor receives a double income at the same time: the first is speculative (expectation of their price increase), the second is income from dividends. If an investor buys a large block of shares, he has the right to participate in systematic meetings of shareholders, where prospects for the organization's development are discussed.

**Disadvantages High risks:** in case of bankruptcy of the company, the shares may be unprofitable, during the years of the crisis, the shares depreciate in value. Without certain knowledge, investments in securities may not bring the expected income. Investing money in securities (in particular, shares) is a long-term investment, so premature withdrawal of previously invested funds from a given asset usually entails a loss of income or even a loss.

**Recommendations.** Investing in company securities is a traditional means of investing free funds. During the crisis, the value of most securities is very attractive for a potential buyer. The risk consists in determining the real possibility of growth in the value of the purchased security. For effective investment, a certain experience is required, it is necessary to consider both economic and political factors. In addition, it is not advisable to invest in only one company (one industry).

7. Mutual investment funds. It provides for the transfer of own capital into the hands of the fund, where it is managed by a team of professionals. Usually, such organizations receive income from the stock market, but the risks and disadvantages of working with the stock market are partially taken over by themselves (for an appropriate reward).



**Benefits.** Availability of this tool (the procedure for participating in it is very simplified). Even a very small amount can be invested in a mutual investment funds. Asset management takes place at a professional level. Good liquidity of the share (if necessary, it is possible to transform the share into a cash equivalent in two to three days)

**Disadvantages** Greater risk compared to bank deposits. Systematic payment of fees to the management company, regardless of whether the fund has a profit or is currently suffering serious losses. A system of discounts and various allowances introduced by management companies for investors wishing to redeem units (by the concept of discounts, we mean the money that the management company keeps during the redemption of units; by the concept of allowances, we understand the money that the management company requires in addition to the price of units in the moment of their issue).

**Recommendations.** The choice of MIF should be done very carefully, to learn information and reviews about it. It makes sense to distribute own capital to several mutual funds.

8. Precious metals. It involves the purchase of valuable (primarily banking) metals in order to preserve and increase the value of funds.

**Benefits.** Protection of savings against inflation (such an investment protects the owner in case of any unstable economic or political situations in the country). High liquidity of use (quick conversion into cash). Stable growth in value in the long term.

**Disadvantages** The need to create special storage conditions (especially with fairly significant capital investments). Purchase and sale

are carried out only through the banking system (with the appropriate bank commission). Capital gains are increasing at a slow pace.

Recommendations. The price of precious metals, like any commodity, is subject to ups and downs. However, the market for precious metals is so large that only professional participants can benefit from it. It is important to purchase precious metals in the most favorable period. Try to identify the main decline in prices. It is worth understanding that such investments pay off only in the long term.

9. Investing in yourself. You can spend money on yourself: undergo treatment, buy a gym membership, learn a foreign language. These investments will pay off sooner or later. This is an investment in health, appearance and knowledge. In fact, they are not a full-fledged way of saving and multiplying funds, since the effectiveness of using the results of such an investment largely depends on the person himself /herself.

Another means of investment is opening your own business, but this method involves very active participation in its activities. Therefore, it should be considered not as a means of accumulation, but as a change in one's own labor activity in general.

There are several common mistakes that people face when investing: idleness (any activity requires attention and certain actions, in their absence it is possible not only to receive income, but also to lose funds); overconfidence (some people overestimate their own money management skills and underestimate risks, especially when they have little positive experience); participation in pyramids (financial pyramids

generate income only at the expense of new customers, therefore, in a certain period of time, they necessarily collapse without any compensation); short-term investing (a significant number of investment methods bring income only for long-term investing, otherwise costs will outweigh income); emotional behavior (due to temporary changes in value or crisis phenomena, the fear of losing funds leads to losses).

## Conclusions

Solvency is an objective indicator of a person's financial condition, the ability to make timely payments for all types of obligations. Money is the most important system that ensures our movement. Personal financial planning is the preparation of a financial plan for one person or a family, which reflects the current financial situation, personal financial goals and means of achieving them.

In order to ensure the normal life activity of an individual or a family, it is necessary to have appropriate sources of income. In addition, an important issue is the formation of the income part of the family budget, the classification of family incomes and the determination of sources of their receipt, as well as the forecasting of these incomes for the future. Continuous accounting and control of income and expenses helps to prepare in time and painlessly cope with a change in the situation.

The cost accounting system and the related cost planning system are individual in nature and can be built by everyone at their own

discretion and for the convenience of further use. You can keep records in any way you like: on paper, in an Excel table or in a specialized program. In such programs, it is convenient to consider and analyze data, so let's turn to the software available on the market. Conventionally, programs can be divided into two groups: with standard functionality that allows you to both consider data and analyze it, and with advanced functionality that includes budgeting.

In addition to retrospective cash flow analysis, it is necessary to forecast future cash flows. Forecasting is reduced to the construction of budgets in the planned period. Depending on the set goals, the budget can be drawn up for different periods: month, quarter, year. Monthly planning is the most common. It is followed by annual planning.

Structuring existing income, finding new sources of income, planning future income, and taking all necessary measures to increase cost efficiency will help achieve financial independence.

Important elements of the financial planning system are competent accumulation of funds for various purposes, creation of investments and risk insurance.

## **Topic 8. The role of communications in self-management**



- 1. Techniques of rational reading.**
- 2. Holding meetings.**
- 3. Rational interviews. Management of the flow of visitors.**
- 4. Conducting telephone negotiations.**
- 5. Rational conduct of correspondence.**
- 6. Use of letters - souvenirs.**

### **1. Techniques of rational reading**

Managers spend about 30% of their time reading. Rational reading helps to better cope with the flow of information, because unsystematic reading means a loss of time and an empty expenditure of resources.

Through special training, you can improve your reading technique and increase your reading speed due to:

- getting rid of bad habits and distractions;
- use of a rational reading technique.

The SQ3R method is used at all stages of reading:

- to reading;
- while reading;
- after reading.

"To read" methods:

1. Sorting the material to read: read only what you really need to get information.

2. Purposefully select and decide whether to read at all, and if so, to what extent:

- What should I read?
- What do I have to read?
- What I want to read;
- What do I want to do with it?
- What could be read later?
- What do I not need to read at all?

Methods "while reading":

- orienting reading - the first perception of the content;
- educational reading - generalization of the content and critical evaluation of what has been read;
- summarizing reading - summarizing the content and critical evaluation of what has been read.

Rules for improving reading methods:

1. When viewing and reading the text, think about what information you want to get from it.

2. Look at the titles of the chapters, run your eyes over the texts on the dust jacket or summary, as well as the preface, introductory remarks and introduction.

3. Find out what you would like to read more intensively. When looking at individual sections, pay attention to the opening and closing phrases, as well as keywords.

4. Do not dwell on notes, parts of the text printed in small print, on arguments, statistical data, detailed descriptions and various indents of the author.

5. Give importance to the content and idea of the text more than to the words. First of all, try to understand the content of private and general statements.

6. Look first for such indicators of meaning as subheadings, highlighted words and sentences, as well as tables.

7. Indicators in the form of words draw your attention to the strengthening of the accent in the text:

- such introductory signals as "especially", "therefore", "therefore", "thus", "I suggest", "because", "because", etc., indicate the main idea; you should read the previous or next part (paragraph);

- "also", "in addition", "additionally", etc. - such reinforcing signals emphasize the opinion that was already briefly stated earlier;

- modifying signals ("but", "on the other hand", "however", "or", "opposite", "although", "despite", "rather", etc.) indicate that the direction (or tendency) of thought changes to the opposite.

8. Omit uninformative passages and slow down the pace of reading in important sections of the text.

9. Also consider the specifics of the structure of various texts:

- reference texts in newspapers and magazines contain the most important information at the beginning, and secondary information at the end;

- in comments and statements on any issue, essential information (namely, the author's conclusions) is given, as a rule, only in the final sentence;

- special articles contain in the introductory part a description of the problem, in the main part - the development of ways to solve it, and in the final part - conclusions or a look into the future.

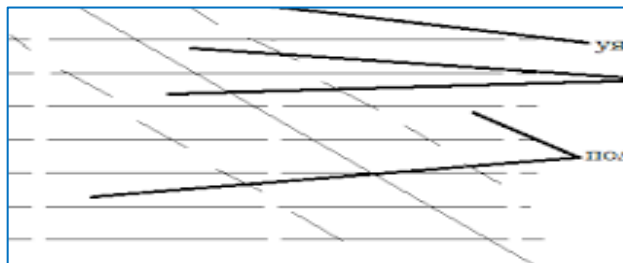
10. Process the text using various types of marks, extracts, etc.

Factors preventing speed reading:

1. Reading by letters or syllables.
2. Talking about the text being read.
3. Return to read places in the text.
4. Surface reading.
5. Observation with a finger or a pencil.
6. Reading "word for word".
7. Movement of the head (instead of observation with the eyes).
8. Postures inconvenient for reading.
9. External factors (poor lighting, noise, distraction, etc.).

Methods of reading technique:

- reading diagonally;
- "slalom"

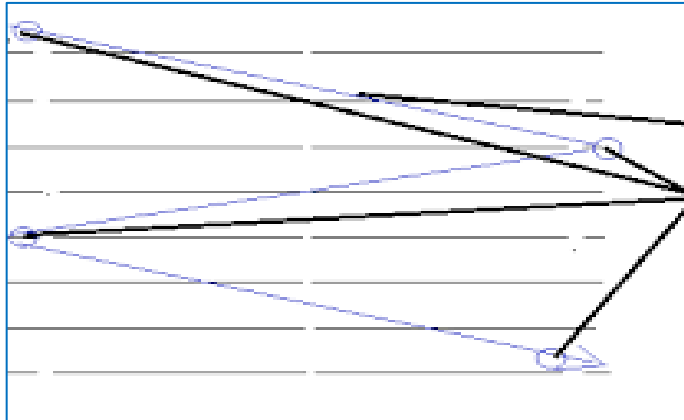


**Fig. 8.1. Diagonal reading technique.**



Disadvantages of the "diagonal" reading method:

- an insignificant part of the text is perceived;
- important information remains out of sight.



**Figure 8.2. Slalom reading technique.**

"After reading" methods:

- text marking (marks)
- preparation of statements.

Advantages of text marking (marks):

- Bullets set priorities as important places are highlighted.
- Marks allow you to additionally structure the text (conditional marks).
- Marks make it easier to process and re-read important parts of the text.
- Marks promote careful consideration and better perception and memorization of information.

Marking methods and methods:

- underlining, evaluations, entries in the fields, etc.;

- use of colored felt-tip pens;
- markography (conventional signs).
- verbatim extract;
- extract "by content" - the author's opinion is conveyed in his own

words;

- summary statement.

1. Overview - processing of such auxiliary materials as:

- Preface and introduction
- Content and cover text
- Headings and subheadings of sections
- Summary and conclusions
- Name and subject index.

2. Asking questions:

- Is it about new or already known information?
- Is this source of information about facts, opinions, hypotheses?
- Which sections or paragraphs are important and which are not?
- What intentions does the author pursue?
- Which views can be agreed with, and which can be denied?
- What preliminary preparation does the text require?
- How does the content of the reading differ from already known

knowledge?

- Does the need for action emerge for me from what I read?

3. Reading

4. Generalization

5. Repetition

## 2. Holding meetings

Preparation of the meeting

"The best meetings are those that don't need to be held at all!"

Direct gathering of people makes sense when there is a need to:

- exchange of information;
- revealing thoughts;
- analysis of difficult situations and problems;
- making decisions on complex issues.

1. Consider what alternatives there may be to holding a meeting:

- the decision of the responsible manager;
- several phone calls or a conference call;
- merging with other meetings.

2. Check whether you need to personally participate in the meeting:

- can you just give up without losing anything?
- can you send your representative who could gain experience as a result?

3. If possible, limit the duration of your participation in the meeting to the time required for your speech.

4. Narrow the circle of participants as much as possible. You should invite only those without whom you cannot do, i.e. employees who:

- directly related to the issues considered at the meeting;

- have appropriate special knowledge;
- will implement decisions;
- have experience in solving similar problems;
- are responsible for the proper implementation of the decisions of the meeting;

- as well as experienced advisors and people who know how to solve problems (or know how to conduct a conference).

5. Correctly choose the date and time of the meeting.

6. Choose a room suitable for the purposes of the conference, in which you will not be disturbed if possible, and take care of the necessary visual information.

7. Determine in advance the goals of the meeting and, accordingly, the agenda items:

- performances;
- project solutions;
- issues requiring a negative solution;
- information, etc.

8. Draw up an agenda with an indication of the time needed to discuss individual topics. For each item, time should be allocated according to its importance (priorities!).

9. Send invitations at least a week before the meeting. Inform the participants as specifically as possible about the topics and goals of the meeting.

Conducting a meeting

1. Start exactly on time. Anyone waiting for latecomers can wait forever!

2. Report the cost per minute of this meeting (earnings of participants per minute plus overheads) and your intention to conduct it rationally. Express confidence in the successful course of the meeting.

3. Agree with the participants on the rules of joint work, for example, on limiting the time of speeches to 30 or 60 seconds, on the procedure for making decisions.

4. Assign one of the participants to keep the protocol.

5. Control interruptions and block such "killer" phrases as "We've never done this before!" (see "Types of meeting participants").

6. Recognize such critical points in the discussion as conversations on "free" topics, hasty conclusions and wrong decisions.

7. During the meeting, check again how the set goals are being achieved: problem analysis, alternative solutions, search for final solutions, information, coordination.

8. Repeat the decisions made and agreed measures in order to secure the agreement of the participants and exclude disagreements.

9. At the end of the meeting, sum up and explain what should be done, by whom and by what time.

10. End the meeting exactly at the appointed time. In this way, you will ensure your reputation as a skillful organizer. During the next meetings, the participants will already discipline themselves and strive for the timely implementation of the agenda; no one will delay their performance and take the time of the next participant.

If you set the priorities correctly when planning the meeting, then you will make sure that the most important points were discussed at the beginning and only insignificant issues remained undiscussed until the end.

End the meeting on a positive note with some kind words.

Types of meeting participants and ways to neutralize them

1. Disputant.

Keep calm and businesslike. Allow the group to refute his statement.

2. Positivist.

Offer him a summary, deliberately involve him in the discussion.

3. Know-it-all.

Invite the group to take a specific position regarding his statements.

4. Talkative.

To interrupt tactfully. Remind about the regulations.

5. Shy.

Ask simple questions, strengthen his confidence in his abilities.

6. Negativist.

Recognize and evaluate his knowledge and experience.

7. Does not show interest.

Ask him about work. Give examples from his area of interest.

8. "Big bump".

Avoid direct criticism, use the "yes, but" technique.

9. The one who asks.

Address his questions to the group.

After the meeting

1. Return - at least from time to time - to the progress and results of the conference that took place, for example by surveying the participants:

2. Were the topic and purpose of the meeting clear enough?

3. Did each of the participants receive the agenda and other materials on time?

4. Did the meeting start on time?

5. Were the agenda and regulations followed?

6. Was the goal of the meeting achieved?

7. Were the tasks assigned and the corresponding deadlines established?

8. How much time was used inefficiently?

9. Draw up a clear final protocol - if possible after 24 - maximum 48 hours after the end of the meeting.

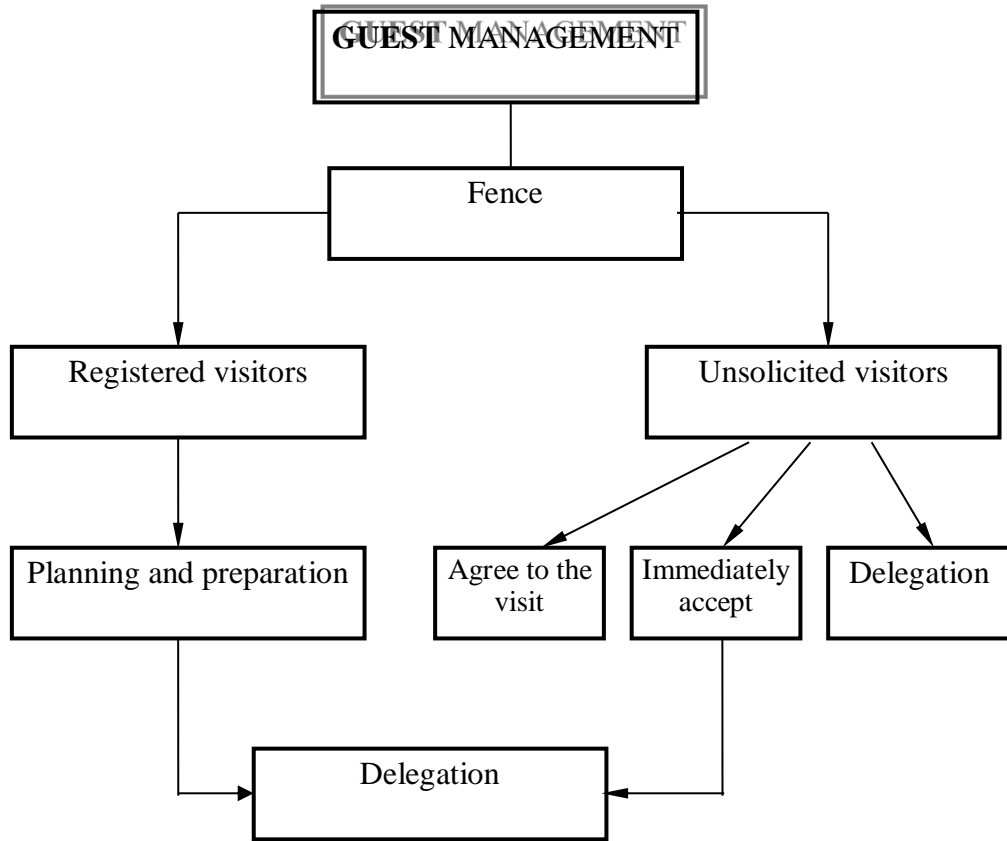
10. The biggest mistake after the meeting is the lack of a protocol, or a bad protocol.

11. The so-called abbreviated protocol with the most important data and results should be distributed to all participants in the form of a photocopy at the end of the meeting; in most cases, a large protocol then becomes redundant.

12. Control whether the decisions made are carried out by everyone they affect.

13. Unfulfilled tasks should be the first item on the agenda of the next meeting.

1. Rational interviews. Controlling the flow of visitors



**Fig. 8.3. A strategy for managing the flow of visitors.**

Protection from visitors:

1. Instruct your secretary to coordinate and adhere to deadlines and dates; let him agree them in advance.

2. Use your secretary's desk as a kind of barrier that no one can pass without answering the question: "What can I do for you?", "Can he call you?" etc.



3. Enter a "quiet hour", for example at the beginning of the working day, when no one can disturb you.

4. Set a general time for visits and instruct the secretary to ask about the reasons and preferably the time of the visit so that you can prepare.

5. Enter a specific reception hour for your employees.

6. Visit the premises where your subordinates sit. It is much easier to say goodbye yourself and leave the room than to use compliments and other means to dislodge the interlocutor from your office.

7. Receive visitors while standing (for example, in the reception area) and determine the priority and necessity of the visit during the greeting. When your interlocutor is already sitting in your office, you are psychologically at a loss.

8. Try to come to work early if possible, instead of staying late in the evening.

9. Shut yourself in some room, for example, in the room of an absent colleague; at the same time, only your secretary can be informed about your location.

10. Do not engage in your personal contacts at the workplace. Arrange, for example, to have lunch with important people for you, or to drink a cup of coffee.

11. Place your desk so that it cannot be seen through an open door; thereby you can avoid potential visitors.

12. And the most important thing: it will put an end to the myth of "open doors"!

### Planning and preparation of visits:

1. Ask yourself, having in mind a specific visitor whom you want to receive or invite, what is the purpose of your conversation.
2. At the beginning of the visit, if possible, find out together with the interlocutor the question: "What is the purpose of this conversation?"
3. Set the duration of the visit in advance.
4. Postpone the conversation to another time if you cannot achieve the goal in the time available to you.
5. Give private information at the end, when you are done with the main topic.
6. Instruct your secretary to monitor the time of the visit; arrange with him that he reminds you of him or intervenes in the conversation with the help of a phrase like: "In half an hour you have to go to city N", etc.
7. Prepare for the interview (background of the problem, previous discussions on this topic, decisions and steps taken) and keep the necessary documents ready.
8. Consider the possible arguments and objections of your interlocutor.
9. Finally, check whether this conversation is necessary and whether there is an alternative (for example, a phone call or a business meeting at the dinner table).
10. Prepare for the conversation, for example, with the help of the following blank sheet.

### Interview with employees:

1. Set a specific reception hour for employees, during which you can discuss with them everything that has accumulated over the past period.

For this purpose, create a separate sheet for entries in your time diary for each employee.

2. Hold regular short operational meetings to clarify emerging operational and management issues.

3. Have lunch with your co-workers once in a while to satisfy the need for personal contact.

4. Encourage your employees to use the phone or write short notes when direct communication is not required.

With unannounced visitors:

1. First of all, ask the visitor about the reasons for the visit (clarify the questions: what, for what, who, why, how, with what, when?).

Depending on the answers received:

2. Delegate the conversation to your employee, to another unit or department.

3. If it is possible to solve the issue with a small investment of time, continue the conversation.

4. Otherwise, agree on a meeting time and "let go" of the visitor

Ending the conversation:

If the visitor does not want to end the interview, use the following methods:

1. Make a general or final remark.

2. Finish the business part of the conversation, go to small talk.

3. Look at the wristwatch, make the programmed signal sound.
4. Show that you are bored.
5. Stand up.
6. Guide your visitor to the door.
7. Begin reading your papers while the visitor continues to speak.
8. Arrange with your secretary to interrupt the conversation and remind you about the next urgent matter.
9. During the discussion, speak a little more energetically and hurriedly.
10. Inform your visitor before the start of the conversation and before its end that other visitors are waiting for you and your time is limited.

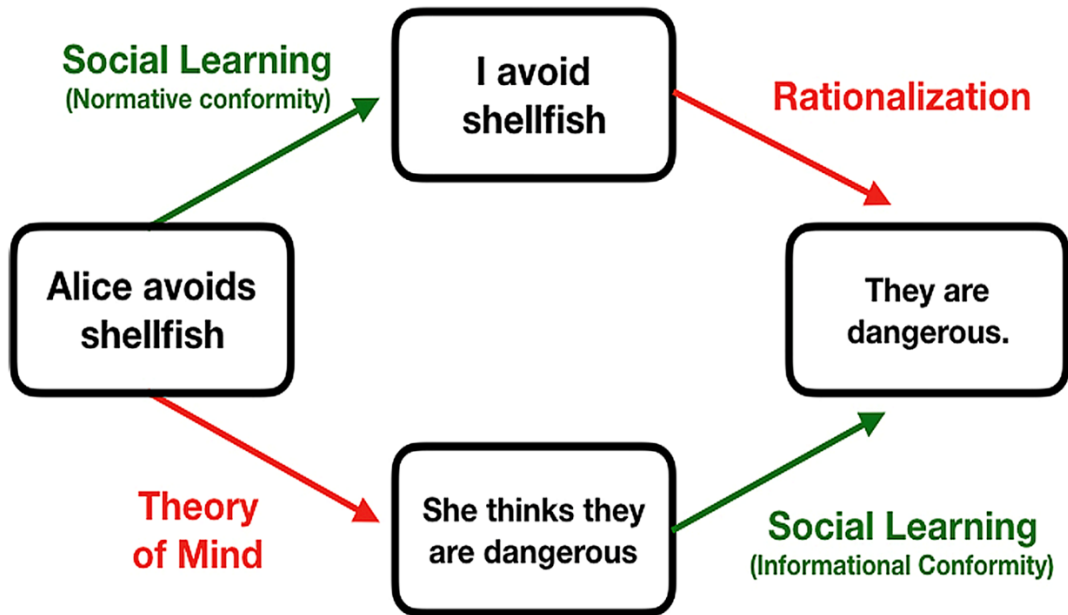
Or simply say that you would like to end the conversation now!

#### 4. Conducting telephone negotiations

10 telephone "sins":

1. The purpose of the conversation is unclear.
2. Improvisation in preparation for the conversation.
3. Unfavorable time for the call.
4. Subscriber number searches.
5. Caller without prior preparation of documents.
6. No pre-recorded keywords.
7. The purpose of the conversation is not clear.
8. Monologues instead of listening with questions.
9. No further recording of conversations is conducted.

10. Non-specific agreements.



**Fig. 8.4. The telephone as a means of rationalization.**

Fencing:

1. Inform all your potential subscribers with whom you constantly deal (subordinates, colleagues, clients, friends, etc.) about when you should not call.

2. If possible, also discuss the time for daily active (outgoing from you) telephone conversations, then it will be possible to group them and process them accordingly.

3. Also inform subscribers of the time when they can call you.

4. Avoid at the end of the conversation such phrases as: "Call me somehow!" Remember it only when you really want it.

5. Do not make your partner wait in vain, who expects to hear from you, but call exactly at the appointed time before he calls you.

6. Let all incoming phone calls go through your secretary, or use an answering machine from time to time.

Fencing with the help of a secretary:

1. The secretary must ask about the purpose of the call to determine the degree of urgency and importance of the conversation.

2. Give your secretary a form with the criteria according to which incoming calls should be rejected, transferred (redial) or "missed" to you.

3. Never entrust the secretary with phrases that are offensive to the caller (offensive - because each person who calls thinks that his business is the most important):

✓ "... at an important meeting";

✓ "... does not want to be disturbed";

✓ "... he has an important visit."

4. Use the wording:

✓ "... he is not at the place (on the road, having lunch, etc.)

and we are waiting for him until 2 p.m. Could you call later?

✓ "... He is very busy at the moment. Should I interrupt it?"

Conducting a telephone conversation:

1. Be brief: keep the contact phase to a minimum.

2. First tell your partner "what it is about", and only then explain the reasons and details.

3. Do not interrupt the conversation for the reason that an important call is received on another device. If necessary, ask if you can take a break and assure that you will call back in 10 minutes.

4. Avoid "parallel conversations" with your employees.

5. Speak clearly and ask for your partner's consent if you want to tape the conversation or connect a parallel device.

6. At the end of a long conversation, briefly sum up and list the measures to be taken (who exactly should do what, when and what)?

7. If necessary, ask or promise a short written confirmation of telephone conversations. The easiest way is to have a copy of the recording of the conversation with a signature.

8. During the conversation, write down important details such as names, numbers and basic information that your subordinates and colleagues can later read and understand.

9. Monitor, especially during long-distance calls, the duration of the call - the cost of your call (use a stopwatch, chronograph, hourglass, electronic counter, etc. for these purposes)

End the conversation as soon as its purpose is achieved

## 5. Rational conduct of correspondence

Correspondence includes:

- ✓ processing of incoming mail;
- ✓ processing of outgoing mail.

Rational processing of incoming mail

1. You should warn the secretary that only incoming correspondence that is important to you should be put on your desk, and refuse all "routine mail".

2. Instruct incoming mail to be pre-sorted (for example, by priority) and placed in special folders.

3. Arrange for the necessary explanatory materials to be attached to the incoming letter.

4. Everything that does not represent informational value, cannot be processed or saved, should be immediately transferred to the wastebasket.

5. When reading the letter, immediately mark all the important places in the text to make it easier for yourself and others to process it further.

6. Make processing instructions and comments on the letter, indicate, for example, keywords of the future answer, deadline, performer, place in the archive, etc. Use the available forms for these purposes.

7. Incoming mail that should be processed elsewhere should be forwarded immediately to its destination.

8. If possible, process the letter immediately after receiving it, that is, while viewing the mail.

9. The processing of each letter consists not only in reading, but also in the development of some measures.

10. Arrange a drawer for mail with three compartments:

- for immediate execution;
- before reconsideration;
- to the archive.

Rational processing of incoming mail



1. Immediate response method: write your response by hand on the letter you received, put the date, signature and send the original to the sender (leave a copy in the file).

2. Preparation of copy letters.

3. Preparation of "pendulum letters"

4. Coordination with the partner - sending two copies marked "Please use the attached copy to handwrite a short answer."

5. Use of standard forms.

6. Use of personal computers.

6. Use of memo sheets

Memo sheets as a means of self-management have the following advantages:

1. Dividing the work into separate phases promotes concentration on the most essential.

2. Accelerated execution of the case releases additional energy.

3. There is no need to think over routine matters again and again.

4. The fear that something has been forgotten disappears; memo sheets provide maximum confidence with minimum control.

5. Memo sheets contribute to the accumulation of experience and improvement of work style.

6. Many things become available for review thanks to making a list.

7. Memo sheets serve as a tool for personal preparation for work.

8. Memo sheets form a basic structure that can be constantly improved.

9. With the help of memo sheets, it is easier to cope with routine work.

10. Memo sheets are a constant accumulator of experience, they relieve our memory.

Note:

- memo sheets serve to manage informational mental processes, as well as the processes of forming opinions and making decisions;
- memo sheets are especially recommended for analysis, observation, control, negotiations and discussions, preparation of reports, business trips, etc.
- preparation of business trips;
- preparation of conferences;
- professional dictation;
- problem analysis;
- control over project implementation;

When studying the topic "Information and communication", students should realize that communication is the exchange of information. Processing of information should be related to personal and professional purposes.

Rational reading is primarily prioritization. It is necessary to know and be able to use the methods and techniques of rational reading (the SQJR method, methods "before reading", "during reading", "after reading", text marking and others).

You should learn the rules for preparing and conducting meetings, the types of behavior of meeting participants, the rational conduct of

interviews, the management of the flow of visitors, the rules for using the telephone and conducting telephone negotiations, the rules for the rational conduct of correspondence, the use of sheets of memos.

Questions for self-control:

1. How can you increase your reading speed?
2. What methods "to read" do you know?
3. What methods "while reading" do you know?
4. What is the essence of the "diagonal" reading technique?
5. What is the essence of the "slalom" reading technique?
6. What methods "after reading" do you know?
7. What are the advantages of text marking?
8. What is the essence and content of the SQJR method?
9. What rules for preparing meetings do you know?
10. What types of meeting participants do you know and how to deal with them?
11. What rules should be applied after meetings?
12. How can you manage the flow of visitors?
13. What telephone "sins" do you know?
14. What is the essence of the concept of "telephone blocks"?
15. What rules do you know for conducting telephone negotiations?

## **Topic 9. Evaluation of the global experience of management and the work of a manager in the conditions of self-management**



- 1. The content of management in the conditions of self-management.**
- 2. Goals and content of the manager's work.**
- 3. Foreign work experience of a manager in the conditions of self-management.**
- 4. Analysis of the factors of effectiveness and successful activity of manager in the self-management system.**

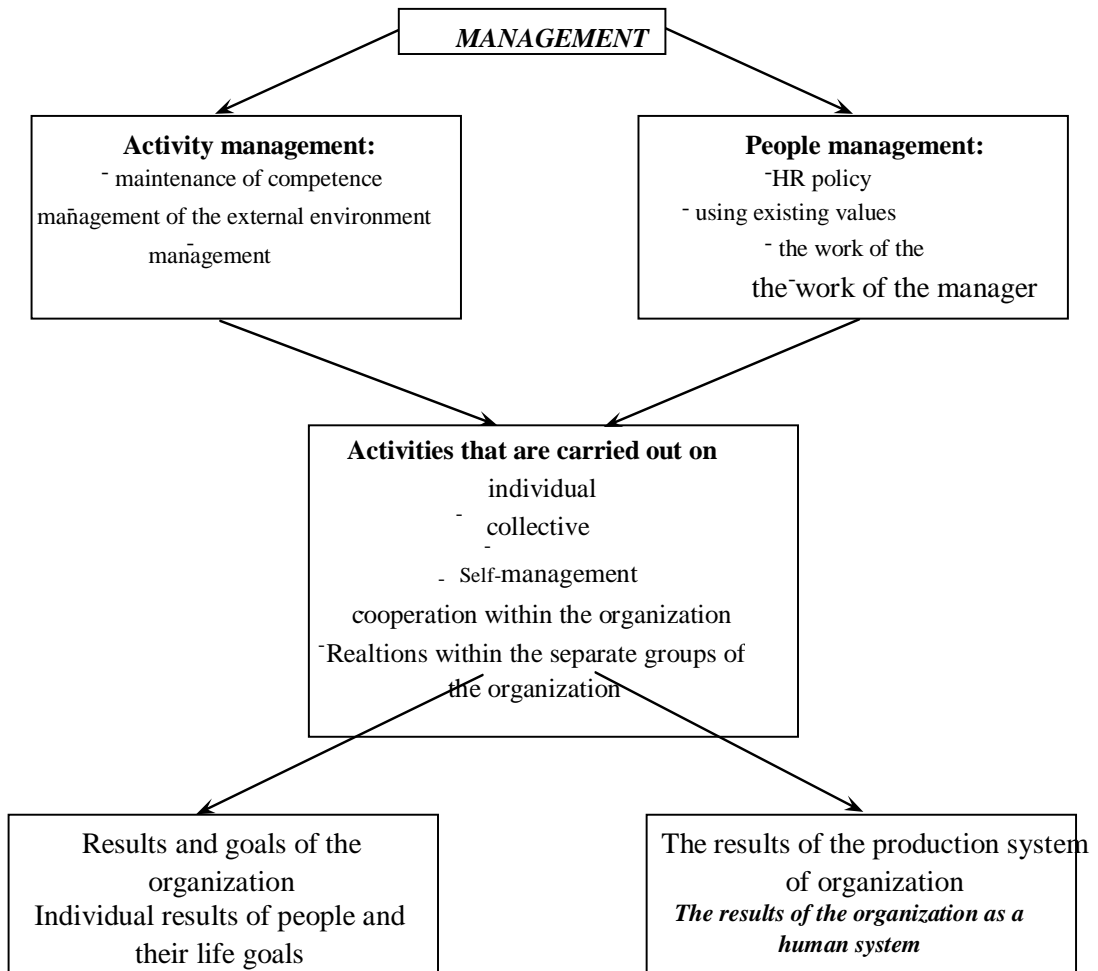
### **1. The content of management in the conditions of self-management.**

Management is a process of influencing the activity of an individual employee, group or organization as a whole with the aim of achieving the maximum possible results under the appropriate conditions; a harmonious combination of human and material resources in order to fulfill tasks and achieve the company's goals.

In practice, a management process is carried out to achieve specific results. Each employee of the labor team contributes to the production process his/her share, which forms the final result. The labor contribution of each employee, if his labor process is properly planned, is an integral part of the overall success. In practice, along with large

firms, there are medium and small ones. There is an opinion that the management process is simpler in small enterprises than in large ones. However, the essential difference is not in size, but in the implementation of management functions. In small enterprises, the functions of manager are often performed by the manager himself/herself. However, with an increase in the volume of work and the size of the organization itself, any employee cannot perform managerial functions. Specialists in this matter are needed for this. So the management functions become the main ones in their activity.

Under the term “management” it is understood not only the work of precisely those persons who are officially appointed to the position of managers, but also the mentoring work of each manager in relation to himself and to subordinates in particular. Let's explain the content of management with the help of Figure 9.1.



**Fig. 9.1. Content of management**

**Activity management.** The goal of such management is to achieve the necessary results in this specific situation and in this environment.

With the help of the management system, managers try to influence the process of achieving the intended goal at all stages - at the stage of planning, implementation (production) and monitoring of implementation. Management of activities and subordinates (environment) means work that has received the name of managerial activity.

**People management.** Means the activity of HR management of the organization. We call this area of management the work of managers. More specifically and in more detail in the "HR Management" course.

Further improvement of the management of the organization's activities and people will be carried out due to the improvement of the management system itself, improvement of the planning of the company's activities, research and development of the microclimate in the organization, as well as constant improvement of the division of labor.

## **2. Goals and content of the manager's work**

The goals and content of the manager's work can be considered from the point of view of the organization as a whole, the staff and the manager himself.

From the point of view of the organization as a whole, the most important goals of the manager are the coordination of long-term and short-term final goals, as well as the continuous development of the organization and its personnel.

From a personnel perspective, a manager must know his subordinates well, both as employees and as people. Discussion of personal problems and support of the manager is considered as encouragement (moral and psychological). At the same time, the manager must take into account the needs of his employees individually

(individual approach). Thus, the manager creates an active and stimulating working atmosphere.

From the point of view of the manager himself, it means that in the workforce, the manager must take care that the work performed at any given moment meets the current and future needs of the staff as much as possible. At the same time, the manager bears the main responsibility for ensuring and constantly developing his own motivation. He should know himself well enough and take care that the work stimulates creativity and initiative. He must properly distribute his working time so that it is enough to solve all important issues. The manager must develop himself both as a person and as a manager. An internally devastated manager (lack of internal motivation) is a threat to the effective work of the workforce. And it will depend only on the manager not to end up in such a situation.

### **3. Foreign work experience of a manager in the conditions of self-management**

Since the domestic experience of self-management is practically absent, it is advisable to consider foreign practice in this area of management. One of the most important questions of self-management is the question: “How can I work most efficiently and achieve the best results?”

By its nature, the manager's job is to appropriately influence the behavior and actions of people, guiding and motivating them to achieve



common goals. However, it must first of all be based on interaction, cooperation between the manager and the employee, in contrast to the traditional management methods that have existed in our country for many decades. The manager's actions are determined by how he understands and perceives his functions and tasks, what position he occupies in relation to them, and on the basis of which premises he acts.

So, the manager's actions are his style, his way of working. A question arises, namely, how a manager should act to ensure an effective result, which is one of the main directions of the development of management thought abroad, around which discussions are held.

For the analysis of this direction, scientists-practitioners conducted a research work, the basis of which was the study of distinctive specific features of the manager's work, namely, the inherent features of two types of managers: **results-oriented manager** and managers based on personal contribution (Table 9.1).

Table 9.1

## Comparative characteristics of types of managers

<b>Inherent traits of a results-oriented manager</b>	<b>Inherent traits of a manager based on personal contribution</b>
<ol style="list-style-type: none"> <li>1. In his activities, he considers both the environment of the company and the external environment.</li> <li>2. Develops principles of activity for his/her subordinates and for the entire enterprise.</li> <li>3. Delegates a significant amount of responsibility to others, acting as a good mentor.</li> <li>4. Considers the existing situation.</li> <li>5. Enables subordinates to show themselves (manifest).</li> </ol>	<ol style="list-style-type: none"> <li>6. Activity is concentrated only on subordinates and work colleagues.</li> <li>7. Implements principles of activity developed by others.</li> <li>8. Strives to keep all management in his hands, acting as a commander.</li> <li>9. Acts schematically even in changing situations.</li> <li>10. Strives to demonstrate both his own and other people's ideas himself.</li> </ol>
<ol style="list-style-type: none"> <li>11. Encourages subordinates.</li> <li>12. Able to distinguish essential from non-essential (use of time)</li> <li>13. Aims to improve in areas he/she knows little about.</li> <li>14. Allows constructive criticism of the company's activities.</li> <li>15. Do not be afraid of risk and responsibility.</li> </ol>	<ol style="list-style-type: none"> <li>1. Mainly interested only in his/her own career.</li> <li>2. Engages in routine work, which is associated with a large loss of time.</li> <li>3. Limits his/her interests to those special fields that are mastered during training and in practice.</li> <li>4. Criticizes work methods.</li> <li>5. Afraid of risk and seeks to act "just in case".</li> </ol>

After analyzing the data in the table, we can conclude that the results-oriented manager differs from the **manager** based on personal contribution in many aspects. Effectiveness of management depends on the qualities of the manager and on other factors, namely, on the changes that occur in various situations in the management process, as well as in the human environment in which management is carried out. That is why

more attention has been lately paid to the leader's actions in the studies of the inherent traits of a manager.

The manager's actions depend on his thinking:

1. One-dimensional thinking is the oldest thinking, based on an authoritarian-democratic approach. Through research and with the help of practical experience, it was proved that the type of management that was used in each specific case was between authoritarianism and democracy.

2. Two-dimensional thinking - at the first stage, the importance of efficiency and obtaining specific results is emphasized. The principles of democracy are manifested in the participation and attention of the staff. Democracy and authoritarianism were considered in combination. At the second stage, the latter were already considered as independent changes. Attention is focused both on tasks and on the person (human factor).

3. Three-dimensional thinking - along with the human factor and activity, the concept of efficiency is considered - effectiveness achieved through management. The main thing in three-dimensional thinking is to consider a specific practical situation and to prioritize the necessary actions of the manager. In practice, this should mean that the manager must mechanically change his leadership style when the relevant conditions change. This should be done flexibly and with appropriate awareness of the need for these actions.

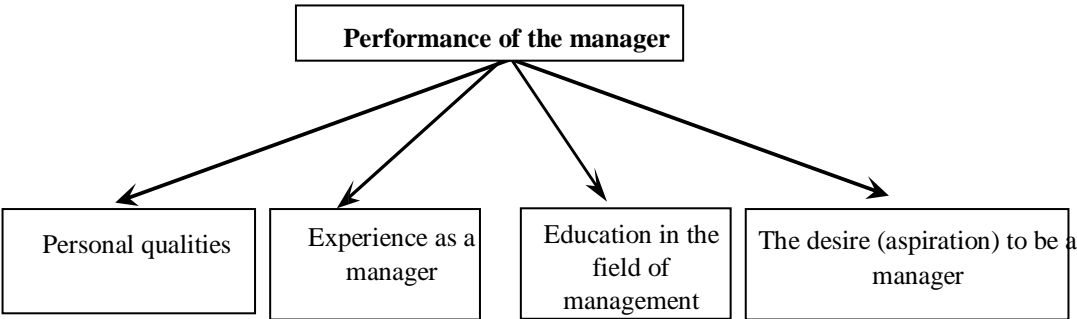
4. Multidimensional management thinking - all requirements that the management process puts before us are considered (personal desire

to learn and in the future to be an effective manager). The main thing in multidimensional thinking is to think and act multilaterally. This type of thinking can be characterized along with efficiency and effectiveness by motivation, quality of work, speed of decision-making. It is the latter that is characterized by multidimensional thinking, in which, after all, the most important elements are efficiency and effectiveness.

Good management results are achieved through the use of changes in different specific situations. Straight-line (one-dimensional) control method is effective only in straight-line situations. However, in practice, the internal and external situation of each enterprise changes very quickly. Therefore, it can be considered that a modern good manager is one who knows how to react correctly and quickly (non-standard, creatively and in a new way) to changes in situations.

**4. Analysis of the factors of effectiveness and successful activity of the manager in the self-management system**

Factors of employee productivity can be shown schematically (Fig. 9.2).



**Fig. 9.2. Manager effectiveness factors**

## Evaluation of the main factors of self-management

This assessment is based on three stages. To analyze the factors of effectiveness, it is necessary to give an assessment of the foundations of effective management. At the first stage, the manager's own strengths and weaknesses are revealed. Data are entered in table 9.2.

Table 9.2

### Analysis of the manager's strengths and weaknesses

strengths	weaknesses
. . .	. . .

In order to ensure the effectiveness of the manager's own work, appropriate conclusions are made about strengthening strengths and eliminating (weakening) weaknesses.

After that, we proceed to the second stage - a detailed analysis of the factors of the manager's successful activity. In order to achieve success, a manager is required to have the appropriate abilities. They include: innate and acquired qualities (technical, analytical, communication, etc.). If there are acquired ones, the manager has a corresponding position and motives for activity. The manager's position and motivation are influenced by incentives (rewards, various rewards) and, of course, the atmosphere in the team. Therefore, success is the result of the correct combination of personal abilities (qualities) of the manager with his official duties.

The basis of creative management is the manager's ability to positively influence other people (employees of the company). A manager is considered good if his influence is justified and if his subordinates are happy to follow his instructions. So, the manager plays an important role in the organization and at the same time bears a special responsibility. A good leader must work in creative interaction with other employees at all levels of the organization, with the firm's clientele, as well as with individuals from other organizations in the interests of their own.

The general qualities of a manager are concentrated in knowledge and skills, in personal qualities and character traits, and communication skills. A manager is a person with a wide range of knowledge, and his most valuable feature is the ability to use the services of specialists when necessary.

Along with this important task of self-management there is the right orientation for the firm considered, which is called strategic planning. At the same time, the manager must see the future of the company, defining goals and objectives and finding ways to achieve and solve them. A strategic approach by the manager should be implemented both when creating and improving the company's activities, and when improving one's own activities and the activities of subordinates.

In general, the art of self-management manifests itself in crisis situations in the form of correct and quick decisions. For example, those managers who have coped well with their official duties for many years in the conditions of stable activity of enterprises, in today's crisis

economic conditions, cannot cope with their own responsibilities related to solving crisis problems, the economic situation, which took place, and in the end, they were rejected from the “steering wheel”, because they did not meet the requirements of the time in all parameters and vice versa.

Today, it is very important for managers how to survive in the conditions of a total crisis situation and fierce competition. Let's summarize all the most important factors necessary for the successful activity of managers in table 9.3.

Table 9.3

**Generalized factors that are necessary for the successful activity of managers**

1. The ability to achieve results and the desire to work to achieve them.
2. Ability and desire to bear responsibility and make risky decisions.
3. Readiness for various kinds of changes, manage them and use them in the interests of the company.
4. Readiness to introduce an open method of management (cooperation).
5. The art of making quick decisions.
6. The ability to focus attention on the present and the future.

7. The ability to see changes that take place both inside the company and outside it, and to use them.
8. The desire for various kinds of social relationships.
9. Readiness for general management.
10. Creative approach to own work.
11. Constant self-improvement.
12. The ability to use your time correctly and rationally.
13. Willingness to motivate oneself and the staff.
14. Willingness to work with staff.
15. Readiness for political leadership.
16. International outlook.

The most common reasons for the permanent loss of effectiveness by managers are the rapid development of technology, improvement of management systems, changes in values, the physical condition of managers, and their personal relationship to continuous self-development.

The third stage is the evaluation of the factors of the manager's effective activity. To do this, we will compile a table of factors of successful activity in the field of self-management. Based on the factors listed above, we choose the 5-7 most important ones. After that, we will determine to what extent the skills and abilities correspond or do not correspond to these factors. Next, we draw up a plan of measures, which involves, firstly, the use of already "ready" prerequisites for success, and



secondly, the refinement of other qualities (Table 9.4). Such assessment of personal qualities must be done once a year.

Table 9.4

Assessment of the factors of the manager's successful activity

1. The most important factors of a manager's successful activity.	2. Assessment of activity factors (whether or not they correspond to the skills and abilities of the manager)	
	<i>2.1. Correspond</i>	<i>2.2. Do not correspond</i>
Action plan for using "ready-made" prerequisites and finalizing other qualities necessary for the manager.		

## **Topic 10. Organization of the manager's practical work in self-management conditions**



- 1. Analysis of factors characterizing the general state of the organization.**
- 2. The role of the manager in the organization and methods of management and self-management.**
- 3. Determination of one's own management style and its use in the manager's practical activities.**
- 4. The essence of the creative approach in the manager's activity as the main element of self-management.**

### **1. Analysis of factors characterizing the general state of the organization**

The main task of situation management is to obtain good functional results - planned or accidental. Commercial results are achieved by leveraging the environment through well-placed people and communications management. For this reason, at the planning stage of management by results, in addition to commercial activities, the desired results of managing people and relationships, as well as the results obtained as a result of the development of the organization, are determined.

*Forecasting management by results*

The success of managing the situation is predicted along with the definition of key results and also:

1. Creative and individual approach to planning.
2. Drawing up a calendar of time use for management tasks from the point of view of achieving results.
3. Readiness to use the most significant external and internal factors of the state of the organization.
4. Possession of effective management and interaction styles, as well as management methods and techniques.
5. Creative improvement of work.

Situation management takes a significant part of all production time, as it is daily in nature. Essential factors of the situation are necessary elements of planning and practice, because they provide work with an individual character. The factors of the situation can be general in nature, affecting the activities of the entire organization. Others are collective and manifest in the work of individual managers.

The influence of the factors of the situation from the point of view of the result can be both positive and negative.

Let's consider the following general factors of a commercial firm, which create the general basis of its activity:

1. General nature of commercial activity;
2. General economic condition;
3. Interrelated groups of the enterprise;
4. Stages of development of the organization;
5. Size;

6. Structure;
7. Atmosphere;
8. Resources;
9. Leaders.

1. The general nature of commercial activity acts as a general factor of the situation, which gives a specific shade to practical activity (depending on the type of activity a given enterprise or firm is engaged in) - the sphere of services, an industrial enterprise.

2. The general economic condition is considered at the stage of activity planning. If the management of the company reacts to changes in the business environment at its various stages, which leads to changes in the resources and state of the market of each individual enterprise, then the negative effects of the economic cycle can be minimized and also used with benefit.

3. Interrelated groups of the enterprise - we are talking about the use of groups to improve the results of activities with the implementation of appropriate measures by the company's management. In its production activity, the enterprise is a part of society as a single system. The enterprise is considered as an open system. Persons, groups that are part of it with their own goals and interests and that depend on this enterprise are called interconnected groups of the enterprise. Such groups are owners, staff (managers, specialists, employees, workers), financiers, customers, society, suppliers. Interrelated groups contribute to the enterprise and receive compensation for this in various forms. Related groups include competitors who also influence the company's activities

and results. Interrelated groups of the enterprise are divided into three types: internal, external and universal.

4. Stages of organization development. The influence of this factor is felt in the current planning for the purpose of management and forecasting of changes in methods of activity to obtain optimal results. The main stages of the organization's development are:

1. The stage of creating an organization - the need for a new type of director.

2. Managers' stage - rebellion of department heads or loss of interest in activities.

3. The stage of delegation of authority, which leads to a crisis of control.

4. The stage of coordination, which leads to a bureaucratic crisis.

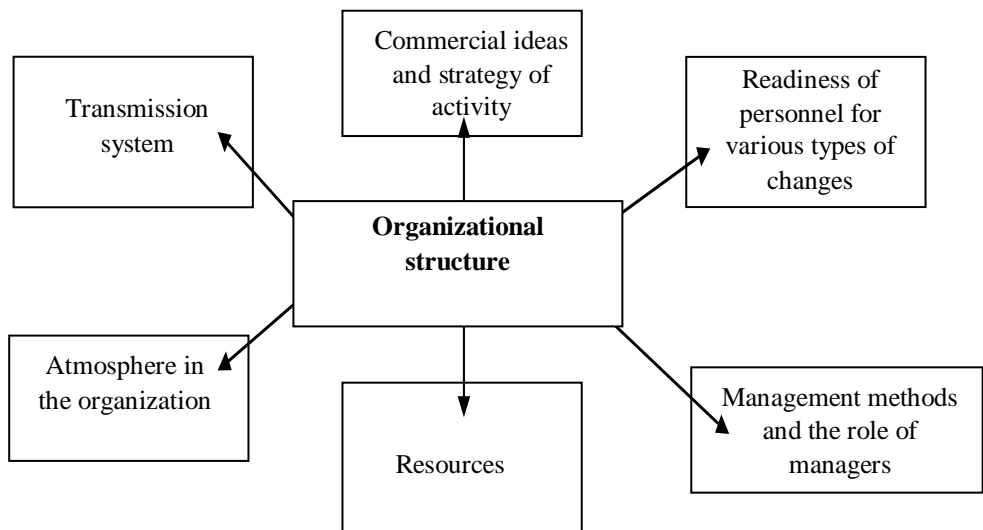
5. The stage of cooperation leading to a psychological crisis.

At each of these sub-stages of development, significant changes are taking place, depending on the goals of the company's management, the structure of the organization, the methods of management's activities, the system of controlling the management's own sources of motivation. The analysis of these sub-stages makes it possible to predict the development of the organization, considering the important point that development is a continuous process.

5. The size of the organization is a static factor of the situation, but changes in its size require active work on behalf of the management. This factor affects the management process, board structure, flexibility, use of resources, interaction with the environment.

6. Structure. There are the following main organizational structures: linear, functional, linear-functional (line-staff), matrix.

In the development of the structure of the organization, it is important to achieve correspondence between the main decisions and the factors related to it (Fig. 10.1.).



**Fig. 10.1. Factors that must be considered when improving the structure of the organization**

7. The atmosphere of the organization can be considered as a combination of factors and properties through the lens of which the organization considers its members and its environment. The content of the atmosphere of the organization is specified on the basis of the subjective experience of its members. The main elements of the

atmosphere are: the structure of the organization; independence; publicity; focus on the development of relations between employees.

Significant results in the development of the organization's atmosphere can be achieved when line management directly participates in this work. The forces of external and internal consultants provide support for measures to develop the atmosphere of the organization. From the point of view of the success of the program for improving the atmosphere of the organization, the personality of the manager is of great importance.

8. Resources (informational, labor, material, financial) possessed by the organization, their quality and quantity are a significant factor in the situation. The task of management is to ensure the possibility of implementing plans, and with this, the continuous operation of the organization for the near and future perspective by developing the use of existing resources and attracting new resources.

9. Leaders. Each manager is a significant factor in the state of the organization. Evaluation of his / her work, available experience, motivation and level of assigned tasks influence the way managers work. Research confirms the fact that the process of improving the organization and the process of individual improvement of managers takes place simultaneously and in stages. The task of responsible managers is to direct the organization as a whole and its individual components in the direction of positive development.

## **2. The role of the manager in the organization and methods of management and self-management**

Carrying out the powers and duties of a manager requires constant care for professional skill (professionalism). Let's consider the role of the manager and methods of management in different situations.

### **Manager in a small business**

A small organization operates flexibly without intermediate levels of management, quickly adapts to new situations. Most often, in a small work team, the role of the manager is not very clearly defined. It often happens that one or more people, due to their experience and competence, become leaders of informal groups. In this case, attention is not focused on the implementation of management functions and these functions are performed in parallel with other work. Both the manager and the workers performing the functions of the bosses themselves perform a large amount of work and participate in practical activities. Relations between managers and subordinates are direct and open.

In a small work team, an exceptionally high readiness to ensure relations with employees is required from the boss. At the same time, the manager builds his own authority on his own professional and personal qualities. The boss is a part of the work team that does not seek to stand out from it. However, nevertheless, he bears special responsibility for the results of activities and a good atmosphere in the work group.



**A manager in an organization operating on a functional basis  
(from several dozen to several hundred employees)**

Let's analyze the organization with a clearer structure, focusing on the functional basis and specialization. Managers of different levels are not able to communicate with all personnel, but at the same time, the managers of each unit must maintain those direct relationships with subordinates that were present in a small team.

The emphasis of the manager's activity and the use of working time is transferred to the solution of direct tasks of leadership and management. Here, the manager of a higher level is responsible for the results of the activity, and the lower manager contributes to their achievement. This means that the number of administrative functions of the manager increases and they take up most of the time. In a small team, the chief must be a good manager of operational practical activities, and now he must be capable of effectively managing an administrative unit.

When running a functionally oriented organization, there is accountability for performance and expenditure. In this case, the manager's duties are clearly defined. The manager's work, by its very nature, is based on tasks and their fulfillment. His task is to timely inform all personnel about the unit's goals and their achievement within the entire organization. The manager is responsible for the constant growth (development) of both his own and subordinates in accordance with functional requirements (needs).

*A leader in a result-oriented team*

Most teams must move to organizational structures and management methods that focus on responsibility for the result. In this case, the requirements for the manager change significantly. He must manage the staff, clearly focusing on the result, and not on the traditional moments - personal contribution or tasks. In such an organization, the manager must demonstrate the following qualities:

- 1) a broad general idea of the state of affairs within one's own unit, awareness of changes in the external environment and the possibilities of their use;
- 2) sensitivity to situations inside and outside the organization;
- 3) creative approach and ability to motivate oneself and staff in order to achieve results;
- 4) desire (aspiration) for cooperation;
- 5) understanding of results, ability to plan and use plans;
- 6) the ability to take risks;
- 7) positive attitude to work, to oneself and colleagues;
- 8) ability to make decisions;
- 9) ability to new thinking with orientation to the result;
- 10) willingness to give an assessment of the obtained results and define a program for the development of the unit and personnel.

#### *Daily work of the manager*

The leader's readiness for effective activity is determined by his daily work.

- An effective manager tries to get good results all the time, and not only from time to time as a result of various accidents; he must clearly define the goals of his/her activity, both for a short and a longer period.

- An effective manager makes a personal plan of work and time allocation for each day and several weeks in advance. He/she makes sure that appropriate plans are drawn up among the staff, at least at the level of working groups.

- This manager strives to obtain good results, planned use of working time, as well as establishing the necessary contacts from the point of view of results both from himself/herself and from subordinates.

- He/she plans clear results for subordinates, especially for a short period, delegates responsibility for achieving results to workers as they grow (subordination). In this case, we are talking about delegating responsibility for the result, and not for solving individual tasks.

- He/she uses as a method of management the conversation about the results, which is also part of the effective feedback between him/her and his/her subordinates.

- He/she chooses, together with the staff, the right way to perform each job or determines how it will be performed - individually, in pairs, or in a group.

- An effective boss skillfully gives orders (instructions) aimed at achieving results. He/she consciously exercises leadership and gives a clear assessment of the work and encouragement of subordinates.

- He/she must skillfully select a competent employee from the existing number of subordinates and teach him/her "all the subtleties of this matter" - in order to later transfer him/her the functions of the boss.

- He/she must develop himself/herself and ensure the development of subordinates, controlling the use of new moments of motivation.

- He/she must value both himself/herself and the staff.

- He/she should strive for cooperation (external and internal).

- Must deal with emerging conflict situations.

- Must successfully use the competence of employees of other divisions.

**Conclusion:** daily management work reflects the mundaneness of management. It is through everyday activity the planned results are achieved.

### **3. Determination of one's own management style and its use in the manager's practical activities**

Determining one's own management style and flexibly applying it along with other management styles makes it possible to use all the significant factors of the situation and other sources of the manager's influence.

When determining his/her own management style, the manager must:

to carry out a revision of the type of thinking

- from one-dimensional to multi-dimensional and "technological" and thinking in categories of related groups.

"Technological" (post-process) thinking allows:

- show a picture of the entire activity of the enterprise and its separate links, their relationship;

- explain the most typical phases of the enterprise's production and financial activity, the influence of the decisions made in these phases on the final results of the activity;

- explaining to staff at all levels their role in achieving final results.

The application of thinking in categories of interrelated groups helps the manager to plan his/her activities and make the right decisions:

- find out which of the related groups are interested in the activity of this enterprise, what contribution they are ready to make and what they expect in return now and in the future;

- analyze the company's strengths and weaknesses, development prospects;

- develop a basis for strategic plans;

- get a basis for further strategic actions.

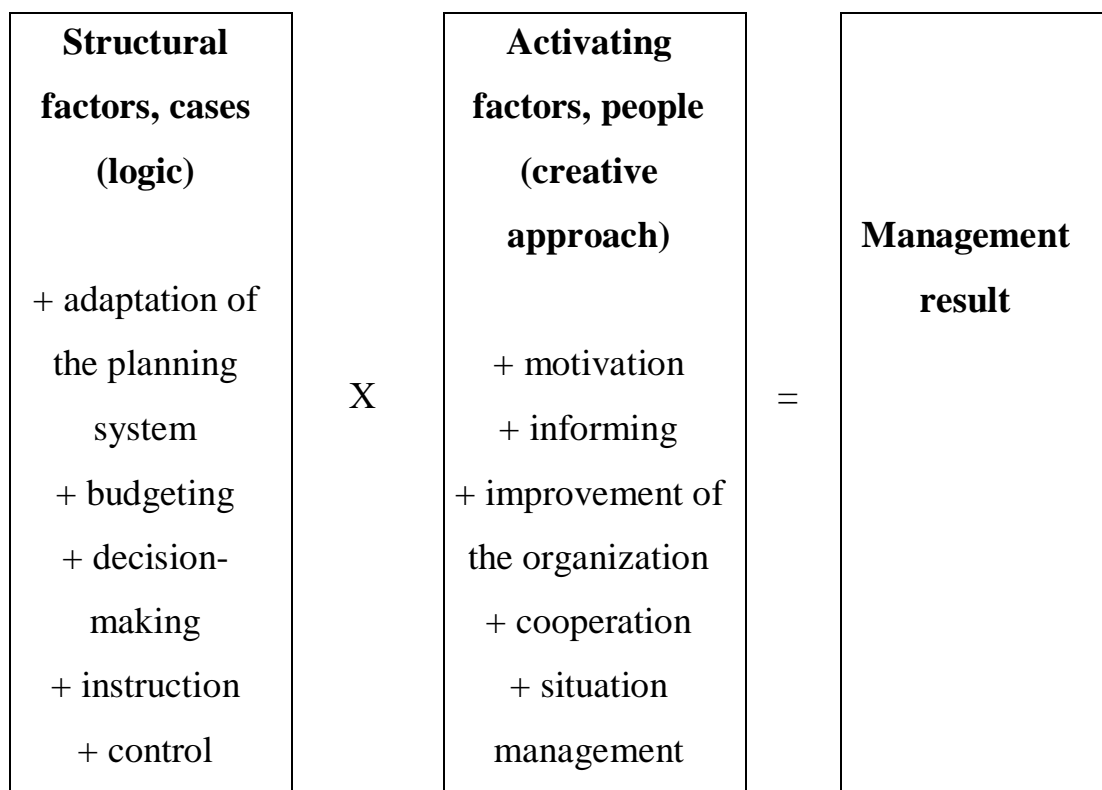
The main dimensions of management styles are authoritarianism (democratic) - establishment of new relations; efficiency - the ability to combine the main factors of the situation to achieve good results.

Since in practice there is no ideal management style, each individual manager among them must choose his/her own style of management decision-making based on the analysis of business and people management. Management of affairs (business) and people

The result of the management of a person, including a manager, consists of two groups of factors - structural and activating.

Management of structural factors means management of affairs, and management of activating factors means management of people. Structural management factors require a rational approach, logic, objectivity, and systematicity. Activating management factors require a creative approach, knowledge in the field of human behavior, a sense of the situation and problem.

A good management result is possible when the manager owns management situations and, thanks to this, achieves a balance in the use of structural and activating factors, which are presented in Figure 10.2.



**Fig. 10.2. Structural and activating management factors**

## **Analysis of own management style**

Multi-faceted testing of management style involves receiving feedback on it. The most competent in analyzing the management style are the manager himself /herself, his/her subordinates, colleagues, direct boss, clients, consultants. On the basis of the feedback received, they draw multifaceted conclusions. Preservation and improvement of personal style makes it possible to use all the strengths of each of them. Knowledge and use of a personal management style will help to use the factors of the situation with the necessary flexibility instead of theoretically existing ideal styles.

### **4. The essence of the creative approach in the manager's activity as the main element of self-management**

Creative problem-solving process

The main stages of creative problem solving are:

1. Definition of problems.
2. Data collection.
3. Development of ideas and proposals for alternative solutions.

The more ways to solve problems are found, the more likely a successful solution will be found.

4. Deciding. When new alternative proposals begin to repeat old ideas, it means that some critical point has been reached when it is appropriate to start deciding. On the other hand, there are situations when the quality of the decision can be improved by postponing its adoption - ideas are allowed to mature before the final decision is made.

5. Joining the decision and convincing others of its correctness. Joining a decision means both being motivated and finding reasonable reasons for making such a decision. For agreement, the implementation of a decision involves its popularization (clarification of new ideas).

6. Activity and control. By improving the creative approach, they try to find ways to implement plans and other practical actions.

### **Creative activity of the manager**

The main condition for the creative approach of an individual is the availability of knowledge and skills. Along with creative activity, logical activity is also required. Thus, a creative approach must be combined with logic. That is, for effective management, it is necessary to act on two levels. These levels of activity are presented in Figure 10.3.

<i>Surface level</i>	Thinking	Language	Reflections and logic
<i>Obstacles</i>			
<i>Deep level</i>	Attachment of feeling	Business	Creative approach

**Fig. 10.3. Levels of creative activity**

Obstacles: searching for a single correct answer or ideal solution; issuance of the expected adaptation response, "fear of the master"; a hasty decision, the inability to postpone criticism for some time as the idea matures; inability to question the obvious; fear of looking foolish.

### *Creative approach of the manager*



A creative approach in management consists of three factors:

1. A creative position is an open, flexible and independent way of relating the personality to the surrounding environment. Constructive cooperation and providing support to others are significant factors in increasing the effectiveness of spiritual resources.

2. Creative expression, with the help of which the individual responds to the requests of the environment, trying to express his /her views, motives and feelings in daily activities.

3. Creative production - with the help of a creative process, a person makes such a combination of known factors that is new for him. In work, the creative approach is specified precisely in creative production.

In the behavior of a person, a creative approach means:

- A sense of the problem, the ability to see problems and the ability to transfer them into situations and development opportunities.
- Originality (uniqueness) – development of unusual ideas, flexibility of thinking and adaptability, if necessary, to the thinking of others.
- Broadness of thinking – emergence of a large number of ideas (it is more likely to find better solutions from a large number of alternative proposals than from a small number).
- Ability to take risks - creative management allows an element of uncertainty when making new, unusual decisions.
- The ability to see the common good - the common good for the organization as a whole.
- The ability to receive information and maintain relationships with others.
- Willpower.

## **Creative capabilities of the manager**

### **Here are some recommendations for support and purposeful development of your own creative abilities:**

- Broaden your horizons. It is necessary to follow various areas of knowledge and accumulate everything that can be used profitably at work. Share your thoughts with others, talk about your ideas, don't hide them. Actively participate in discussions of those issues that interest you. Collect clippings from various publications, make notes and re-read them from time to time.

- Maintain activity and interest in business. Concentrate all your attention on the work you are doing. Learn to learn from your own experience. Failures and negative experiences also have a positive result, as they contribute to development.

- Actively and non-standardly develop the field of your specialty. Systematically review specialized literature and other sources instead of reading everything one after the other. Collect information, analyze it, group it by problems. Draw appropriate conclusions and write them down.

- Develop your problem-solving skills. Show interest in emerging problems. The correct approach to the problem saves time, and its definition is already half the battle. Be sensitive to the opinions of new employees of your organization who are not yet blinded by tradition and structure. Learn to listen to different points of view and recognize the existence of a problem. Solving and using problems in the organization's

own interests is a sign of a healthy organization. Problems give us the opportunity to grow. They are a challenge for us!

- Ideas are born in work. Write down all the alternative solutions that come to your mind. Don't stay too long on one way to solve a problem. Forget about criticism completely, you are looking for an idea, not criticizing it. Ask yourself if this problem can be solved in a non-standard way. Give space to your imagination. Write down ideas that come to you immediately.

- Develop self-confidence and interest in business. A good mood is important when an idea appears. Eliminate all obstacles in creative work, especially at the beginning. Try to engage in creative work during periods when you are in a good mood. Interest in the case and a great desire to solve problems are extremely important prerequisites at the initial stage of the creative process.

- Polish ideas and learn how to present them correctly. Learn not to talk about "your" offer, but about "our" offer. Try to make suggestions when others can accept them. Promote ideas in the right place and in the right atmosphere.

- Creative organization

Why do creative individuals, working in a group, team, often become uncreative people? How to achieve that the creativity of each person is directed to the achievement of the goals of the organization? What organization is considered creative? Signs of a creative organization:

1. Good organization of planning. This means that the organization has a good understanding of its purpose and business ideas, and there is a system for strategic and day-to-day planning. The effective system of integrated planning shows the limits and key results that the organization must achieve in its activities.

2. Purposefulness. When, on the basis of the key results of the organization, the key results of individual employees are determined in such a way that managers are motivated to act in accordance with the plans, then it can be considered that there is purposefulness in this organization. The search for a result should be manifested in daily activities, both in situations of solving specific problems and in the conditions of decision-making.

3. Open transfer of information. Open, clear, critical and constructive information is necessary for the manifestation of purposefulness, as well as a creative approach. The openness of the atmosphere allows for experimentation, admits the confrontation of contradictions and the improvement of cooperation in the organization.

4. Individual and creative approach to solving problems. The atmosphere in the organization should stimulate creative manifestations. Creative workers should not be considered inconvenient people, but on the contrary, they should be considered as a resource for the renewal of the organization.

5. Flexible organizational structure. The matrix organization is a creative solution to the organizational structure and promotes the manifestation of creative actions.

6. Decision-making, knowledge of the case and competence are extensive. In a creative organization, the resources of specialists, responsibility and authority are spread over all links of the organization. This makes it possible to make the most complete use of all the existing capabilities of the organization.

7. Availability of external contacts. This presence is ensured by means of interconnected groups and maintaining contacts with them. An organization that studies and gets to know its environment is able to determine its own position and find real objects of development.

Conclusion: Every organization can absorb only a limited amount of creativity. This number will depend on the stage of development of the organization, the industry, the size of the organization, the number of employees and other factors of the situation.

A similar conclusion can be made in relation to an individual manager: each manager perceives only a limited amount of creativity from subordinates. A significant excess of the optimal limit leads to contradictions. Thus, consideration of the relationship between a manager and a subordinate helps to answer the question of who and to what extent a creative employee should be.

## **Topic 11. Formation of the qualities of an effective manager**



- 1. Formation of professional and business qualities of a manager.**
- 2. Development of administrative and organizational qualities of the manager.**
- 3. Development of social and psychological qualities of a manager.**
- 4. Development of personal and moral qualities of the manager**

### **1. Formation of professional and business qualities of a manager.**

A manager is a person in an organization who implements management activities, develops management decisions, and solves management tasks.

A manager is a person who has special professional knowledge and experience in managing organizations and is hired to effectively manage the organization's resources. His work consists in the organization and management of the enterprise to achieve the set goals.

The main requirements for managers can also be divided into the following types:

- knowledge: managerial, psychological, economic, administrative and legal;
- skills: communicative, analytical, organizational, technical.

Not every person who has all these traits can become a successful manager. The main thing is the presence of a set of special qualities,

which can be divided into three main groups: professional, personal and business.

Professional qualities characterize any competent specialist, their possession is a necessary prerequisite for performing the duties of a manager. Among the basic professional qualities, the following can be noted:

- high level of education, production experience, competence in the relevant profession;
- breadth of views, erudition, deep knowledge of both one's own and related fields of activity;
- striving for constant self-improvement, critical perception and reinterpretation of the surrounding reality;
- finding new forms and methods of work, helping others, training them;
- the ability to plan one's work.

Personal qualities of the manager. This group includes the qualities that every employee should possess:

- honesty;
- responsibility;
- psychological health;
- poise, ability to control oneself;
- sensitivity, positive attitude towards others.

In addition, this includes the following personal qualities, which not everyone has, but which the manager is obliged to possess:

- optimistic outlook on life;

- self-confidence;
- sociability and desire to communicate;
- stress resistance;
- charisma;
- interest in people;
- organization;
- purposefulness and ambition;
- justice.

However, it is not professional or personal qualities that make a person a leader, but business qualities - the ability to find (within the limits of competence and authority) the best approach to emerging situations and the shortest way to achieve the goal, to quickly make independent, reasoned decisions, consistently ensuring their implementation. Basic business qualities include the following:

- the ability to create an organization, provide its activities with everything necessary, set and distribute tasks among the executors, coordinate and control their implementation, encourage them to work;

- energy, dominance, ambition, desire for power, personal independence, leadership, courage, determination, persistence, will, demandingness, uncompromising in defending one's rights;

- contact, sociability, the ability to attract people, to convince them of the correctness of their point of view, to lead;

- purposefulness, initiative, efficiency in solving problems, the ability to quickly determine the main thing and concentrate on it;



- responsibility, the ability to manage oneself, one's behavior, workers, time, relationships with others;

- desire for transformations, innovations, willingness to take risks and lead subordinates.

The professional self-determination of managers contributes to the quality selection of applicants for this role and at the same time increases the efficiency of the work of those already working.

In American business schools, a candidate for a manager's certificate must demonstrate competence in the following areas:

1. To understand the nature of management processes, know the main organizational structures, functional responsibilities and work styles of managers; have a clear idea of the manager's responsibility, the distribution of responsibility by management level, as well as ways to improve his/her efficiency;

2. To know information technology and means of communication, which are necessary for personnel management, to be able to express one's thoughts in writing and orally;

3. To be competent in managing people, selecting and training specialists who are capable of leadership and normalization of business and personal relationships among subordinates;

4. To know the peculiarities of the relationship between the firm and its clientele;

5. To have the ability to manage resources;

6. To have the ability to plan and forecast the company's activities using technical means;

7. To be able to evaluate personal activity, draw correct conclusions and improve qualifications, based on these requirements and expected changes in the future

## **2. Development of administrative and organizational qualities of the manager.**

One of the main qualities includes organizational abilities, the development of which is facilitated by learning methods, interactive educational technologies, game technologies, case technologies aimed at the ability to logically express one's thoughts, the ability to personally speak and make responsible decisions in uncertain situations, and of course, experience gained during work. The use of heuristic and creative teaching methods in the educational process plays an important role.

The formation of organizational skills in managers is a complex process that involves taking into account factors affecting its effectiveness.

This is largely facilitated by:

- active participation in seminars, lectures;
- extracurricular work (sections, circles) or additional work in a specialty;
- volunteer and project orientation of activities in the education process;
- a combination of study and work, which expands the student's opportunities to realize creative potential, develop communication skills.

Managers can perform different roles in their activities.

The requirements for what qualities managers should have at different levels of management are different. At lower levels - decisiveness, sociability, and some aggressiveness are valued to a greater extent; at the higher levels - the ability to think strategically, assess the situation, set new goals, carry out transformations, and organize the creative process of subordinates comes first.

The behavior of managers should be distinguished by persistence, readiness to receive and transfer information, rationality, teamwork, diligence and accuracy, honesty, justice, humor, desire for contacts, readiness to respond correctly to reasonable objections, as well as readiness to make decisions, self-criticism, self-control, confidence in the manner of behavior, tact, respect for people, a positive attitude towards competition, orientation towards the achievement of set goals.

So, the requirements for a manager are quite diverse, because:

- the manager's work consists of a combination of several roles;
- the manager's role in practice is interdependent and interact;
- the importance of roles varies depending on the level of management;
- the manager's roles determine the scope and content of his/her work.

Recognition of the manager, namely his/her authority, is important. The leader's authority implies a generally recognized influence on the behavior of subordinates due to his/her characteristics and merits. The components of this authority are knowledge of the matter, the ability to

make well-thought-out decisions, fairness in evaluating subordinates, rational organization of their joint work, activation of employees and motivation of their efforts. The role of a manager in modern conditions is to see earlier, more fully and more deeply than others what needs to be done, to know how to do it.

### **3. Development of social and psychological qualities of a manager.**

The basic socio-psychological qualities of a manager are revealed in his/her ability to manage himself / herself.

Self-management is based, first of all, on an objective assessment of one's abilities and existing knowledge in a certain field. The need for self-management is constantly manifested in the process of everyday life, it allows a person to realize himself/herself as a person, that is, to achieve planned goals, to steadily move towards the goal.

It is obvious that it is a person who is in control of himself/herself who can hold leadership positions and ensure stable development.

The ability to manage oneself is most evident in the following situations:

- solving complex problems in the optimal time;
- the ability to overcome difficulties and difficult situations;
- rational distribution and use of time;
- maintenance of physical health and morale at appropriate parameters.

It is obvious that self-control is most necessary in difficult situations that periodically arise in the course of work and in everyday life. In order to solve problems more rationally, it is necessary to be able not only to rationally allocate one's time, but also to have the willpower to use it rationally. This requires a certain amount of knowledge and, of course, physical health.

#### **4. Development of personal and moral qualities of the manager.**

The personal qualities of managers consist in the presence of a desire for respect. Possession of positive personal qualities is a prerequisite for successful leadership. They include:

- physical and psychological health;
- high level of internal culture;
- sensitivity, care, benevolent attitude towards people;
- optimism, self-confidence.

Among the general set of personal qualities of a manager, strong-willed qualities play a significant role. Even with a high level of professionalism and competence, the manager is not always able to skillfully and productively manage the team, mainly due to the lack of proper willpower.

Will is a person's conscious regulation of his/her behavior and activity, associated with overcoming internal and external obstacles.

– goal orientation – the ability to subordinate one's actions to the set goals, the presence of clearly defined target orientations in various spheres of life;

– perseverance – the ability to mobilize one's capabilities for a long-term struggle with difficulties, the ability to direct and control behavior in accordance with a defined goal;

– courage – the ability to overcome fear and take a justified risk for the sake of achieving a goal, despite the danger to one's own well-being.

– decisiveness – the ability to make and implement quick, well-founded decisions, the ability to put aside hesitation and doubts at the right moment and resolutely focus on a specific goal and determine ways and means of achieving it;

– initiative – ability to work creatively, act proactively;

– independence – the ability not to be influenced by various factors that can distract from achieving the goal, to critically evaluate the advice and suggestions of others, to act based on one's views and beliefs;

– endurance – the ability not to pay attention and not to be influenced by actions, feelings and thoughts that interfere with the implementation of a decision.

Quite often in professional activity, a manager may face unpredictable and uncontrollable circumstances that require self-control and calmness from the manager.

Such a personal trait as self-confidence is important for a manager, which is associated with a person having a clear goal and the ability to take decisive actions to achieve it. In order to develop this quality, it is

advisable to: avoid negative emotions in the process of business communication, express your thoughts clearly, behave in a friendly manner, be persistent and determined in achieving the goals, and do not be afraid of mistakes.

Moral qualities are quite important for a manager. The requirements for them are marked by diversity, because the mental structure of the person himself/herself is complex. They are necessary to create a climate in the team that promotes the development of healthy interpersonal relationships, conscious discipline of labor relations. Moral and psychological qualities determine the manager's ability to attract people to him/her. The value of the manager's moral traits and reputation increases in the context of corruption and the development of the shadow economy in society.

The basic moral qualities of a manager are the following:

- honesty and decency, truthfulness and sincerity, modesty and simplicity;
- principledness, a developed sense of responsibility, demandingness towards oneself and others;
- fairness, benevolence, impartiality and respect in relations with subordinates, the ability to create an atmosphere in the team that promotes productive activity;
- knowledge of human psychology and an individual approach to subordinates taking into account their personal parameters: character, temperament, value orientations, the ability to work with people and knowledge of methods of effective influence on them;

- willingness to establish contacts with subordinates, striving to protect their legitimate interests, care for their everyday needs;
- the ability to empathize, identify (the ability to mentally put yourself in another person's place and look at the problem from their point of view);
- kindness, tact, recognition of others' successes;
- objectivity, adequate perception of criticism;
- tolerance and politeness, prudence and balance;
- sociability, the ability to listen and hear;
- developed sense of humor;
- sense of personal responsibility, reliability.

The manager must be a subtle psychologist who discovers the inner strength and abilities of the employees, which they may not even have suspected; warns against mistakes, supports. In his/her work, he/she will be hindered by excessive emotionality, which affects the course of decision-making and their implementation. An emotional leader is prone to impulsive, unreasonable actions, sometimes to rudeness in communication. Excessive emotional tension negatively affects both intellectual activity and relationships with the team. At the same time, emotionality is a positive factor in management. Feelings contribute to the elevation of physical and spiritual forces, the formation of passion for work, without which success is impossible.

The property of self-reflection, that is, the need and ability of self-knowledge, is important for a manager.



*Questions for self-control*

1. Justify the component models of a modern manager.
2. What factors determine the professional competence of a manager?
3. What professional qualities of a manager are a prerequisite for his/her success?
4. Define the key characteristics of a successful manager.
5. Summarize the most important business qualities of a modern manager.
6. Analyze the important personal and socio-psychological qualities of a manager.
7. What roles does the manager perform in the course of his activity?

## **Topic 12. Management of resource of education**



- 1. The concept of the resource of education and the educational potential of the individual.**
- 2. Methods of management of resource of education.**
- 3. Career potential of the individual.**

### **1. The concept of the resource of education and the educational potential of the individual.**

Education is the quality of a developed personality that has acquired experience, with the help of which it is possible to navigate in the environment, adapt to it, protect and enrich it, acquire new knowledge about it.

The relevance of research and development of the resource of education of individual is constantly increasing, which is caused both by intensive changes in the external environment, recognition of the individual, his/her moral position, culture, education, and professional competence as the basis of the progressive development of each country and all of humanity, as well as by changes that occur in the structure of the individual (especially in the value-motivational) sphere. The ability to: competently work with information is also important; to think critically; use modern technologies; generate new ideas; to think

creatively; work together in different areas, preventing conflict situations or skillfully getting out of them; to work independently on the development of one's own morality, intelligence, and cultural level.

Education in the modern sense includes: knowledge and skills necessary for activity in a specific field (for example, fundamental and professional knowledge should be distinguished: the first is necessary for developing a worldview and methodology, the second - for obtaining a profession); volumes of humanitarian and natural-scientific knowledge that allow integrating the culture of a modern educated person; knowledge of information technologies and foreign languages; medical knowledge necessary for a person to maintain his/her physical health; psychological knowledge that contributes to the most comfortable existence of an individual in society; knowledge of communication practices and self-knowledge; knowledge about knowledge and methods of increasing knowledge.

The analysis of approaches to defining the concept of education showed that ideas about the content and essence of education vary significantly: from education as the presence of education to education as a subsystem of personality culture or a component of intelligence.

Education is perceived as:

1) a set of knowledge, skills, and abilities (this approach to understanding education is considered outdated today, but it is still present in the works of a number of authors);

2) systemic (in particular, personal) quality, which covers the totality of knowledge, abilities, skills, features of the worldview, moral standards of a person;

3) education as a competence (or a system of basic human competencies).

Analysis of approaches to the concept of "education" shows that quite often the authors cite it in connection with such concepts as "learning", "competence", "educational potential".

Education forms functional literacy, and education - personal qualities that ensure individual perception (acceptance) of the world, the possibility of its creative transformation; extensive use of subject experience in the interpretation and evaluation of facts, phenomena, events of the surrounding reality based on personally significant values and internal attitudes, independent choice of ways of their implementation. Education does not provide knowledge, but understanding of the world with individual values and meanings. Without education knowledge will be a formal, impersonal, externally imposed process. Education is considered as a personality trait expressed in the desire for self-improvement (self-knowledge, self-determination, self-realization). It accompanies a person throughout his/her individual life, characterized to a large extent by self-education, the sources of which are much wider and richer than targeted training. Education, unlike learning, is always personally selective, purposeful; is based on the subject's attitude to the subject of knowledge, always individually

motivated. Learning is measured by other criteria that differ in generality, standard, and effectiveness.

The process of personality formation in the form of a person's consistent advancement to higher achievements in his/her educational level, which involves passing several degrees: literacy, education, competence, culture. Mastery of literacy characterizes the initial, minimally necessary level of readiness of an individual to carry out independent activities in various spheres of life, in particular in the professional sphere; the achievement of education characterizes the acquisition of the necessary and sufficient knowledge about the surrounding world and the mastery of the most general methods of activity (skills, abilities) aimed at the knowledge and transformation of certain objects of reality; professional competence is related to the formation on the basis of general education of such professionally significant qualities for the individual and society, which allow a person to fully realize himself in specific types of work; mastering culture implies that a person is not only aware of the material and spiritual values that were bequeathed by previous generations, but he/she is also able to adequately assess his/her personal participation in the development of society and ready to contribute to the continuous culture-creating process of both his/her own society and civilization in general .

Education can also be considered as the realization of educational potential. The potential can serve as a universal possibility of any system. Most often, it is understood as an opportunity, a resource or means, a reserve that can be realized, applied, put into action to achieve

a certain goal or a certain condition. The signs of an individual's educational potential are: subjectivity (how the individual himself/herself evaluates his/her opportunities, how he/she plans and intends to implement them) and objectivity (external assessment of the individual's potential); internal (depending on personal qualities, such as natural abilities, peculiarities of neuropsychological processes, mental states, etc.) and external (depending on the opportunities provided by society: the state of education development, traditionality and innovativeness of education, opportunities for mobility, continuity, etc.).

Educational potential is considered in three main forms: educational conditions, that is, factors that ensure the achievement of educational goals by the subject; educational resources, i.e. opportunities to occupy a certain place in the social hierarchy with the help of education; educational achievements, i.e. the totality of the results of educational activities and activity of the subject regarding the improvement of the educational potential and the expansion of one's own possibilities in the socio-economic system, the labor market and other spheres of social relations.

In our time, an educated person is not so much a person who possesses knowledge and a formed worldview, but is prepared for the dynamic realities of life, is able to navigate the complex problems of modern culture, and understand his/her place in the social being.

Signs of an educated person:

1. "Education as orientation. "Education begins with curiosity. Curiosity is an insatiable desire to find out what is interesting in the world.

It can spread in a wide variety of directions, but all the time it is about two main tasks: to learn about something and to understand why it is so. Education is a double learning: a person studies the world and learns to learn.

2. "Education as enlightenment." The power of knowledge prevents a person from becoming a victim. It is difficult to deceive someone who knows more, he can protect himself when others try to play him like a ball in their interests. A person educated in this sense has a valuable commodity - mental incorruptibility.

3. "Education as historical consciousness." The process of education is to understand that other people may have different beliefs, ideas and reasoning. According to this, education is awareness of diversity, respect for others, rejection of arrogance. Currently, an educated person is one who has the widest and deepest possible ideas about all the possibilities of human life.

4. "Education as a way of expression." An educated person is a reader who knows how to read books in such a way that they change him/her. An educated person can talk better about the world and about himself/herself, his/her ability to better express his/her thoughts allows him/her to deepen and expand his/her self-awareness.

5. "Education as self-knowledge." An educated person is one who knows himself/herself (his/her inner diversity), understands the

difference between the identity he/she creates to fit his/her social roles and the fragile inner diversity, and knows how difficult it is to acquire this knowledge.

6. "Education as self-development." In the process of self-education, it is not about accumulating and deepening knowledge and ideas about oneself. An educated person defines his/her own spiritual personality. He/she does not cling to a personality created once, but recognizes the constant process of new self-evaluation and tolerates all the hesitations associated with it.

7. "Education as the ability to empathize." The development of the capacity for compassion, which, thanks to one's own cultural identity and tolerance, is not only a formal tolerance of others, but a genuine and natural respect for another way of life. Education is the art of keeping a balance between acknowledging others and insisting on one's own views.

8. "Education as a poetic experience." Education is always oriented towards a certain benefit: a person learns know-how in order to do something, to achieve something: earning, power or recognition. The enlightenment in question is a value in itself that opens up a new dimension of happiness through heightened awareness of the present while reading poetry, looking at pictures, listening to music.

9. "Education is passionate." An educated person can be recognized by a violent reaction to what hinders education. A truly educated person is not ashamed to be Don Quixote.



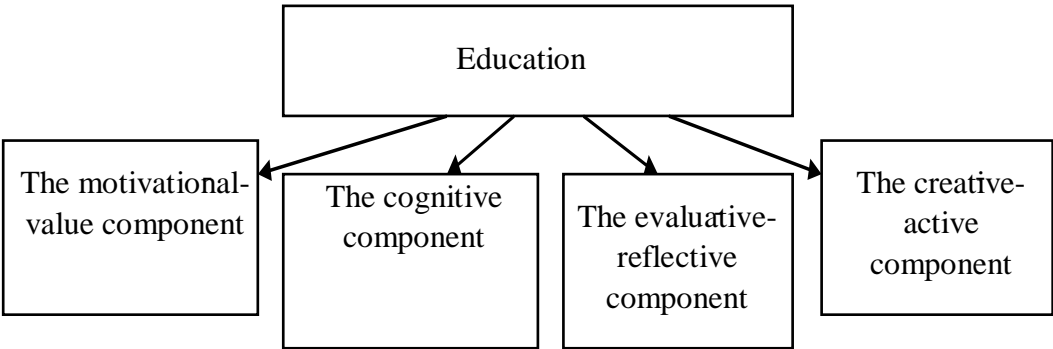
Education cannot be the same or fixed value. A modern person lives by the standards of minimum and maximum education and provides ideal models of the minimum and maximum education of a cultured person in relation to various stages of his/her growing up:

The first stage (3 years - 17 years): learning the socially necessary minimum knowledge (family - preschool institutions - school).

II stage (ages 17-22): training in a profession, the socially necessary minimum of special knowledge and skills (special educational institutions).

III stage (after 22 years): satisfaction of one's own informational needs and development of knowledge and skills to evaluate oneself - one's abilities, one's possibilities, one's merits and shortcomings.

An important issue in the study of personality education is the analysis of its structure. If we consider education as the initial level of competence, then its structure can be presented in the manner shown in fig. 12.1.



**Fig. 12.1. The structure of personality education**

The motivational-value component is related to the motivational sphere of the individual. It is characterized by the following indicators:

attitude to education as a value; understanding and experiencing its significance both for society and for one's own development; interest in education in general; enthusiasm for science and the desire for constant professional self-improvement.

The cognitive component contains a set of knowledge about the surrounding world and mastery of the most general methods of activity. Knowledge is a higher form of manifestation of the perception of data and information, which is active in nature and is formed on the basis of not only facts, but also analysis and various types of logical conclusion. It is based on general techniques and methods of intellectual activity (analysis, synthesis, comparison, abstraction, generalization, concretization), general and specific skills of working with data, which together make up information skills.

The creative-active component contains a set of abilities and skills necessary for making appropriate decisions in various conditions, as well as the readiness to implement these decisions in the practical solution of professional tasks using a creative approach.

The evaluative-reflective component characterizes comprehension, self-analysis and self-evaluation of one's own educational activity and its results, clarification of the ways of its organization, determination of optimal methods and techniques for working with data based on one's own experience. All components of education are regulated by reflection. Thanks to reflection, a person tracks the goals, process and result of his/her educational activity, and also realizes the internal changes that are taking place in him, realizes himself as a changing

personality. Reflection allows you to identify and overcome contradictions that arise in a person's life between knowledge and behavior, desirable, possible and actual. Thanks to the reflexive mechanism, a person moves to new levels of his/her development.

## **2. Methods of management of resource of education**

The resource of education is one of the most valuable human resources in the modern world. It is the only self-reproducing resource that accumulates the more a person uses it. Recognition of this fact requires a person to pay more attention to the management of this resource.

The analysis of theoretical studies shows that the approach to education that is continuous in space and time is the most widespread in psychological and pedagogical literature today. The development of the concept of continuous education intensified in the mid-1980s and continues today. At the beginning of the 2000s, the modern version of continuous education was formed. The main idea is that every person in any period of his/her life should have the opportunity to participate in the educational process. On the basis of continuity, it was possible to build a single model of accumulation and use of human capital, which includes professional training (learning to know, learning to do), general cultural development (learning to be) and civic education (learning to live together).

A significant number of domestic and foreign scientists emphasize the need for life-long learning, that "it is necessary to teach a person to quickly, systematically and consistently master new knowledge and information as they are constantly accumulated and developed, that is, to provide education throughout life, which should become a way and style of social individual existence of a person in the information society".

The traditional education system is focused on the student's acquisition of knowledge, skills and abilities. Its goal is knowledge, and its ideal result is erudition. At the same time, the system of continuous education is focused on the formation of an individual algorithm of cognition, its goal is the transformation of information and the formation of a stable research experience in operating with information, and the result is new education.

The system of continuous education in the structure of mental activity is shown in the table. 12.1.

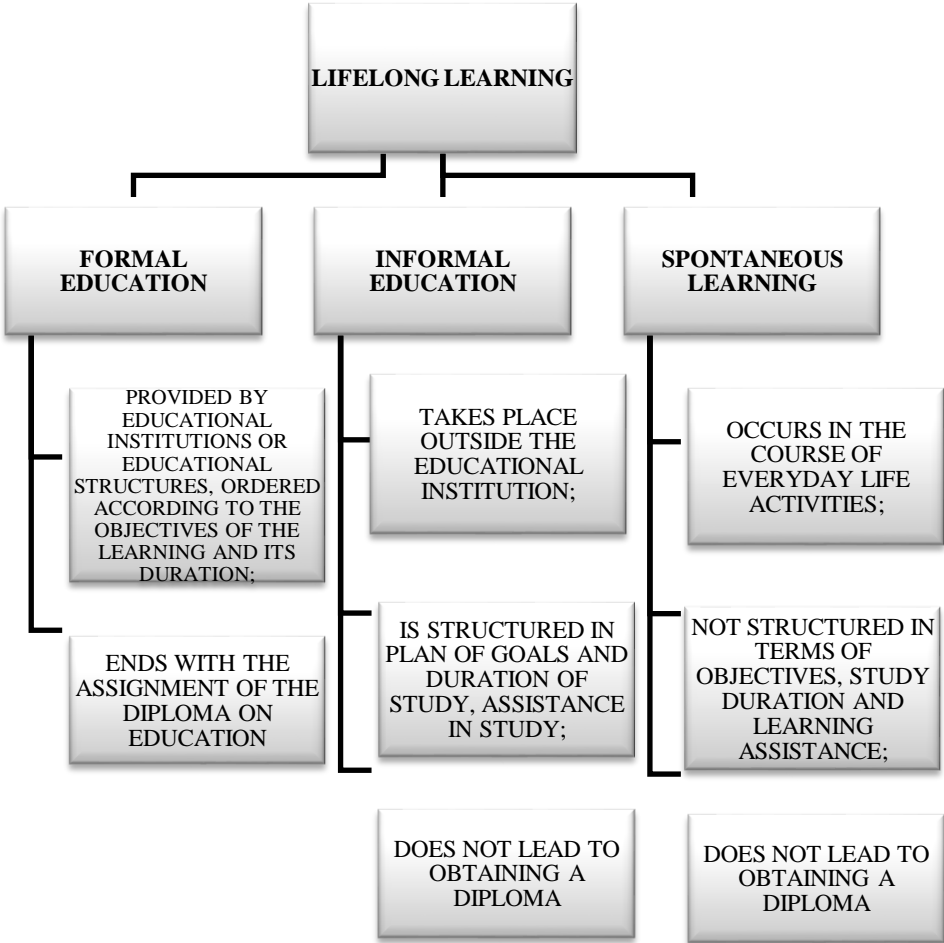
**Table 12.1**

**System of continuous education in the structure of mental activity (\*priority direction)**

Criterion	The system of traditional education	System of continuous education
Aim	knowled	Knowledge about
Method	discursive	intuitive
Result	erudite	researcher
Priority direction	<p>New education*</p>	

In such a tandem, the interaction of the two systems will dictate new conditions for the formation of a new educational space: at the human level, there will be a need for the formation of an individual research mentality; at the level of society - the formation of a system of continuous education as a social value and a means of actualizing social and individual needs and opportunities through scientific and research activities.

Lifelong learning is divided into three components, shown in Fig. 12.2.



**Fig. 12.2. Components of the lifelong learning system**

Spontaneous learning is also called informal education. This form is usually distinguished by the lack of organization and can be carried out both at the individual level (for example, self-education) and at the group level (for example, at the workplace or in the family during leisure time). Informal education is difficult to empirical and statistical analysis. However, it is informal education that can most effectively change attitudes and behavior patterns of people in everyday life. Therefore, there is an opinion that this type of education should be called everyday education. This makes some sense, because daily activities or simply spending time are the most continuous and uninterrupted (except perhaps for sleep time) periods of human life.

Since education is manifested primarily through the set of characteristics of individual educational achievements of a person, a number of tasks must be solved to define it:

- 1) to determine the list of evaluated objects - the characteristics of individual educational achievements, the system totality of which sufficiently characterizes the quality of an individual's training in general and can be presented in the form of a system of criteria and indicators of the quality of training;

- 2) to determine the basis of comparison - the system of criteria and indicators of the quality of training, on the basis of which the evaluation should be carried out;

- 3) to determine the value of the indicators, that is, to obtain data on the characteristics of individual educational achievements;

4) to evaluate, i.e. to compare the received values of the indicators with the relevant criteria and indicators of the quality of training and give an assessment of compliance (yes/no);

5) draw up a conclusion in which the obtained assessment of the quality of the specialist's training will be substantiated with a sufficient degree of reliability.

Almost every person in the modern world understands the need for self-development, but not everyone manages to bring this idea to some concrete result. Most often - either because it is not clear where to start, or the chosen methods of self-improvement turn out to be difficult, uninteresting and do not give quick results.

Knowing the methods of self-development allows you to start and maintain this activity even in the presence of moderate motivation for personal and professional growth. The main principle of this work is to consider all available opportunities as a certain development resource, then look for opportunities to use these resources in the development of one's abilities and competencies. This will be the basis of self-development.

The problem of self-development is especially relevant in the professional sphere. It is most developed for HR management.

To activate the professional self-development of the manager scientists suggest using special techniques, methods, and technologies. The main means of activating the manager's professional self-development are listed in the table. 12.2.

Table 12.2

**Means of activation of professional self-development of the  
manager**

<b>Title</b>	<b>Content</b>
Self-monitoring of competence	Assessment of knowledge of modern economics, management, industry technologies, as well as innovations used in management, in particular during organizational transformations. Knowledge tests, practical tasks and analysis of specific situations can be used to obtain such assessments. On the basis of the received assessments, it is important to draw the correct conclusion about the nature of the change in one's professional competence over the last period of time
Evaluation of personal professionally important qualities	Qualities can be assessed with the help of special personality tests, questionnaires, self-analysis of one's own behavior in significant professional situations. Here, it is also important not just to measure some qualities, but to determine in which progress (positive dynamics) is observed, and in which it is absent. Determining the reasons for both the positive dynamics of competence and its absence, which will allow clarifying and concretizing plans to work on yourself at the next stage of career growth
Inventory of changes in work and in oneself	A procedure that must be carried out once a quarter or, at least, once every six months. Its essence lies in the accounting, analysis, and systematization of all changes in the tasks, content, and requirements of the work performed, on the one hand, and those changes that occurred during this period in one's own personality and professional competence, on the other. Similar assessments allow you to determine how well they correspond to each other. The meaning of this procedure is to be constantly ahead of the level of changing requirements for important matters with your professional readiness
Ability to learn from others	The creation of an attitude to search and learn new things in various situations where there may be interesting information, useful knowledge, new experience. Management of your motivational settings provides a high development effect even in work at traditional meetings, seminars, and even more so in specially organized forms of training and development



<p>Table of life and professional goals</p>	<p>Compilation and periodic correction of the content of the table of life and professional goals. The main tasks of the technique are to: understand as many real motives and relevant goals of behavior as possible; to differentiate one's motives and goals into personal ones (generally related to life) and professional ones; determine the degree of conformity of one's life and professional motives, and then carry out their conscious correction</p>
<p>Diary of achievements and failures</p>	<p>A detailed or generalized description of situations with an analysis of the causes and factors of positive and negative results of one's own activity. Helps to avoid situations when a person repeatedly "steps on the same rake", which allows for better awareness, as well as critical evaluation and systematization of one's own experience, making practical and correct conclusions</p>
<p>Modeling your professional portrait</p>	<p>The procedure of compiling one's professional and psychological characteristics, which consists of the most striking features - both positive and negative, which were demonstrated over a certain period (for example, the last week) or during the solution of any responsible task. It is best to use graphical modeling tools. In this case, the "professional portrait" will look like a systematic drawing with short verbal designations. This procedure should be carried out periodically, preferably alternating successful and unsuccessful stages of work in which the manager looks different. So, his professional portrait will be significantly different</p>
<p>Working with a simulated professional portrait</p>	<p>Comparison of the received portrait with the previous ones, which allows you to plan "cosmetic" changes, carry out refinements, and highlight random and permanent features. Visualization of your professional qualities and competencies allows you to understand them more clearly, use them better, and control them</p>

One of the universal mechanisms for increasing the effectiveness of self-education is reflection, as a process of self-knowledge and self-regulation by a person of his desires, goals, mental actions, self-image, experiences and thoughts. In the order of individual work on the development of self-reflection abilities, the researchers recommend:

ending each working day with a retrospective analysis, first of all of those episodes with which you are not completely satisfied, as well as those that require further reflection and action; check your ideas, assessments that have been formed about other people. How reliable are they, in what ways are they inaccurate, in what ways are they wrong? It is also one of the ways to develop the ability to reflect; communicate more often with people who are not like you, whom you do not always manage to understand, who often hold different views. Any attempt to understand such people is an activation of one's reflection, as well as a prerequisite to find a more effective solution or, at least, an agreed one.

Self-stimulation is also an important step - a process in which a person independently determines the motives for self-education, weighs all the positive and negative aspects of the results achieved, the advantages that he/she received in the course of self-education. An effective form of self-stimulation is self-conviction (a person convinces himself/herself of the need for self-change, using logical arguments, and develops the necessary attitude in himself/herself). Another means of overcoming "barrier" in the form of one's own shortcomings is self-command. Methods of self-stimulation organically develop into methods of self-programming.

Scientists recommend the following methods of self-motivation: strive for goals, including promising ones, but live for today. It is necessary to have understanding that real life is only here and now and to take primary responsibility for motivation to live. The more a person feels that he/she is the cause of his/her behavior, the more independent he/she is in his/her

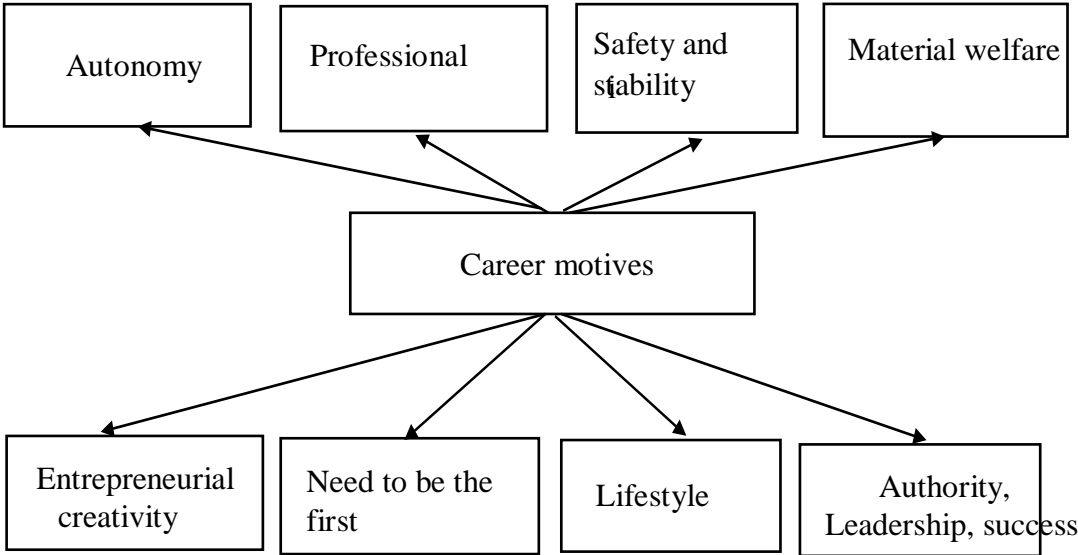
actions and the higher his/her personal contribution to the activity, the higher the motivation and satisfaction. Let us consider that organizations and people develop through crises. It is necessary to develop an appropriate attitude towards this: a crisis is not the end, but a stage, a necessary attribute of development; it can and should be overcome, but lessons must be learned from it. The crisis itself is a means of personal growth; whereas motivation for work is only part of motivation for life. The one and only "motivational line" of the individual, which is limited exclusively to the professional sphere, is a risky attitude. If it collapses, a "motivational vacuum" occurs, which leads to severe consequences of loss of meaning in life and personal dramas.

### **3. Development of the career potential of the individual**

One of the important aspects of personality development and the result of management of resource of education is the realization of the professional, business and career potential. Awareness of one's own career opportunities is a serious step towards their successful implementation.

Career is the movement and position (status) of a person, subject of labor activity in the system of social, economic, business, property and other relations, determined by the complex relationship between his/her personal positions, resources and socio-economic situation (external conditions, circumstances) in a specific period of life.

The first step in career planning is to determine the individual's interests, inclinations, capabilities, and skills. In fig. 12.3. motivations for a business career are given.



**Fig. 12.3. Career motives**

There are different approaches to defining career models. One of them is given in table. 12.3.

Table 12.3

**Career models**

<b>Model</b>	<b>Characteristic</b>
Professional career (in various enterprises/institutions during life)	Education, employment, professional growth, support of individual professional abilities, retirement
Intra-organizational career (within one enterprise)	Successive change of employee development stages in one enterprise
Vertical	Climbing to a higher level of the corporate hierarchy

Horizontal	Transfer to another functional area of activity or performance of a certain official role at a degree that does not have a rigid formal anchoring in the organizational structure
Centripetal	Movement to the core, management of the enterprise (for example, the transition from a regional division to the head office)
Situational career	Unforeseen movements of the employee
career "from the boss"	The main factor of influence is the actions of decision-makers
career "from the object"	The main factor of influence is the successful implementation of the project
self-made career	Career growth thanks to high qualifications
career "by corpses"	Actions according to the principle "the end justifies the means"
System career	Actions according to the principle "the end justifies the means"
"springboard"	A smooth vertical career until reaching the "ceiling", then a jump from the "springboard" - retirement
"stairs"	Gradual vertical career with a clearly defined period of each position occupation
"snake"	Horizontal movement from one position to another with a relatively short period of occupation them
" crossroads "	Vertical and horizontal personnel transfers, and the consequences of periodic attestation

An interesting approach to the evolution of an individual career was proposed by A. Tolstoy, who identified nine career stages:

1) reasoning about future work, ideas about career and its features, training for a future profession;

2) education and training. This state depends on the requirements for the future profession;

3) entry of the individual into the professional world, adaptation, emergence of a professional "self-concept";

4) professional training and further specialization in the conditions of organizations;

5) achievement of membership in the organization, clarification of personal motives and personal values, awareness of one's talent, strength or weaknesses;

6) if professional growth in the organization is impossible, then a decision is made to transfer to another organization;

7) crisis, self-reevaluation, questions about the correctness of choosing a profession, planning the future path of development;

8) reduction of involvement in the profession, preparation for retirement or decision to continue working;

9) retirement [89].

Researchers also pay attention to the factors that determine the formation of a career [74]:

Firstly, these are factors directly related to a person, i.e. motivation, decision-making on changing roles and status, features of specialization, etc.; secondly, these are factors related to the interaction of the individual and the organization. This is the influence of other people on a person's professional career (for example, family planning

and combining the interests of the family and the organization, reaching the organizational "plateau" of the career, the organization's need for specialists of this profile, etc.).

There is a significant number of methods and techniques that can be used to realize your career potential:

1) effective self-presentation technologies (career promotion portfolio);

2) technologies for determining the optimal career path (career charts, career maps);

3) optimization technologies for setting career goals and the process of developing career plans (scenario of career analysis and development of a personal development plan, technologies for developing a career plan by H. Zaitsev, A. Kibanov, S. Reznik, V. Sanders and others).

A portfolio of career advancement is a package of documents in paper and/or electronic version that reflects all achievements of an individual (academic, professional, etc.). A career promotion portfolio provides more complete information about a candidate than a standard resume, which allows a potential employer to easily familiarize himself with the level of his/her training and creates conditions for a more informed personnel decision. The career advancement portfolio reflects not only already achieved successes, but also potential opportunities for the candidate's professional development. In addition, the content of the portfolio is constantly updated, as it should reflect all the achievements of the potential employee.

One of the most popular methods, which is mainly used for strategic career planning, is the development of a career chart. A career chart is a document in which the optimal career path to senior management positions, as well as other key positions of an organization or enterprise, is presented in a visual (graphic) form. A career profile usually covers a time period of 10 years or more.

M. Armstrong's method of building career maps is based on the development of professional competencies. M. Armstrong determines the levels of career growth through the prism of information that an employee must possess in order to perform work at a higher level. He calls these levels ranges of competence, for each of which there are clearly defined requirements for the experience and training of specialists. The boundaries of the competency ranges are marked by key points. A career map is created based on the defined competency ranges and key points.

The method of building a career introspection scenario and developing a personal development plan is used by employees to make an informed decision about their career development. The introspection script includes the following steps:

- 1) "your skills and your work". Analysis of one's skills and current job requirements, unsolicited skills as a platform for changing jobs; skills that are needed and that are not, are indicated as a need for development;

- 2) "your life and your work". Finding out what the employee expects from life and what role work should play in it. It is important to answer the question "how can priorities change over time?";



3) "change of career options". The employee is invited to imagine some possible future career options;

4) "why do you need to learn something useful for yourself in the future?". Given the chosen career option, the employee indicates what it would be useful to learn if he intends to follow this path;

5) "how do you solve problems?". You need to indicate your habits and problem-solving skills;

6) "What do you plan to learn without fail?". This stage helps to choose the most important learning goals;

7) "which method of learning suits you best?". The process of helping the employee with his training plans begins. Here you need to review your study habits, style and skills;

8) "to what extent do you meet the deadlines?". An analysis is made of whether the employee invests in the terms of training in accordance with the technical context of his work;

9) "learning opportunities and resources". Here, the employee's attention is drawn to the opportunities and resources needed to implement the intended training plans;

10) "planning one's development". The employee develops a plan of activities for individual training related to work and career.

The method of development of the personal life plan of the career of the manager A. Kibanov is based on the algorithm of self-analysis and determination of career goals. This technique is intended for planning the career of managers. According to the methodology of A. Kibanov,

the personal life plan of a manager's career should consist of three main sections:

- 1) assessment of life situation;
- 2) determination of ultimate career goals;
- 3) defining private goals and drawing up an activity plan.

The algorithm for developing a career plan includes the following steps: assessment of the life situation, which is conducted in the form of a questionnaire and contains information on the results of the manager's self-assessment of the prospects of his professional activity, economic well-being, physical health, psychological state, social role and human relations, family life, etc.; defining a list of final personal career goals, which includes specific tasks, depending on the degree of their importance and terms of their implementation, as well as a set of resources necessary for their implementation; private goals and activity plans that will contribute to the achievement of ultimate personal career goals .

V. Sanders' career planning methodology is based on the SWOT analysis method and is designed to optimize the setting of career goals. It organizes the process of identifying one's own interests and needs, and also motivates the mobilization of potential opportunities and resources for their realization. V. Sanders' career planning methodology involves the performance of two tasks that facilitate the further choice of a career and drawing up an individual career development plan. They include:

1) "balance of advantages and disadvantages". You should analyze your strengths and weaknesses (what are the opportunities for career advancement and what is currently lacking);

2) "review of likes and dislikes". Everything that a person wants to achieve in life and what he would like to avoid is listed.

S. Reznik's career planning methodology includes three stages:

1) building a balance of personal successes and failures, which is formed on the basis of determining the most important successes and achievements, highlighting the abilities and abilities that were used in the process of their implementation, identifying the most significant defeats and failures, as well as abilities that were not enough for effective implementation of professional activity, outlining the methods the employee used to overcome these failures;

2) grouping of abilities and capabilities, highlighting the two or three most important strengths and weaknesses, for example: professional knowledge and experience, social and communicative abilities, personal abilities, leadership abilities, intellectual abilities, etc.;

3) carrying out an analysis of "goals - means", in the process of which the means necessary to achieve the desired goals (personal, financial, time) with the real situation. For example, it is necessary to highlight the five most important goals, outline the means necessary for their implementation. The next step is to identify intermediate or additional goals that still need to be achieved in order to get closer to the main goal, specify the necessary qualifications and set specific realistic

practical goals for acquiring experience and skills that are currently lacking.

H. Zaitsev's career planning method has the form of an exercise that helps a person realize the role of a career in his/her life and understand his/her expectations from its implementation. The exercise is performed independently by gradually performing a series of steps:

1) draw a horizontal line that reflects the past, present and future of the individual's career, mark with a cross the stage at which he/she is now;

2) to the left of the cross, where there is a part of the line responsible for the past, mark events in life that gave a real sense of satisfaction and fulfillment;

3) analyze these events and determine the specific factors that caused these feelings; to the right of the cross, on the line responsible for the future, mark the events that are related to the career and from which the person expects to receive a sense of satisfaction and fulfillment;

4) rank the events marked on the future career line from important to less important;

5) return to the third step and rank the events outlined there from important to less important, compare two spheres of events - past and future;

6) discuss the results with friends, colleagues, mentors and relatives.

## **Conclusions**

Education is the most valuable resource of an individual, with the help of which he/she is able to navigate in the environment, adapt to it, protect and enrich it, acquire new knowledge about it and, with this help, continuously improve himself/herself. Education in the modern sense covers not only the knowledge and skills necessary for activity in a specific field, but also the scope of humanitarian and natural-scientific knowledge, knowledge of information technologies and foreign languages; medical knowledge, psychological knowledge, knowledge of communication practices and self-knowledge; knowledge and methods of increasing knowledge.

Education has a complex structure that combines a motivational-value component, a cognitive component, a creative-active component; evaluative-reflective component. The most significant from the point of view of self-development is the evaluative-reflective component, which regulates all components of education. Thanks to reflection, a person tracks the goals, process and result of his/her educational activity, and also realizes the internal changes that are taking place, realizes himself/herself as a changing personality. Reflection allows you to identify and overcome contradictions that arise in a person's life between knowledge and behavior, desirable, possible and valid.

To activate professional self-development, a person should use the following special techniques, methods and technologies: self-monitoring of competence, assessment of personal professionally important qualities, inventory of changes in work and oneself, ability to learn from

others, table of life and professional goals, diary of achievements and failures, modeling his/her "professional portrait", work with a modeled "professional portrait".

One of the results of education resource management is the realization of an individual's professional, business and career potential. For this, you can use the technologies of effective self-presentation, the technologies of determining the optimal career path, and the technologies of optimizing the setting of career goals and the process of developing career plans.

## Topic 13. Development of managerial potential



**1. Self-development, self-education and self-knowledge of manager.**

**2. Aspects of self-organization and self-improvement of manager.**

**3. Creativity in the manager's work.**

**1. Self-development, self-education and self-knowledge of manager**

### *Acmeological approach to self-development of personnel*

For the first time, the term "acmeology" was proposed by M. Rybnikov in 1928 to denote the period of maturity as the most productive, creative period of a person's life. "Acme" is the highest point, flowering, maturity, the best time. This period covers the age from 18 to 55-60 years and is characterized by the completion of general somatic development and puberty, the achievement of optimization of physical development, as well as a high level of intellectual, creative and professional achievements. The structure of psychophysiological development of adults combines periods of ups and downs and stabilization of functions.

Mature age is a period of a person's practical, professional life. Setting life goals is based on the principles and ideals defined at the previous stage, as well as on the person's life plans. Difficulties

accompanying certain stages of life are overcome by the desire of the person to develop, become more mature and responsible. In the course of development, a mature personality independently chooses or changes the external situation of its development, and thanks to this, it also changes itself.

Responsibility creates a psychological space for self-development and self-realization, sets motivationally and situationally verified benchmarks for the deployment of these processes; determines the zones of the optimal ratio of external demands on the individual, on the one hand, and the level of demands on the individual and his/her actual capabilities, on the other. Responsibility acts as a controlling mechanism that monitors the personality, determines its stability in relation to external destabilizing influences and internal unbalanced initiatives. One of the dimensions of responsibility is the individual's subjective locus of control.

Locus of control is a stable strategy of a person to see the source of control over his/her life and behavior mainly in himself/herself or in the external environment; one of the most important mechanisms that determine a person's ability and ability to overcome life's difficulties, thus providing the opportunity for his/her self-development and self-realization. A personality with an external locus of control attributes responsibility for the events that determine his/her life mainly to external factors. Internal personality (personality with an internal locus of control) sees the source of the events of his/her own life first of all in himself/herself, feels a stable connection between his/her own actions,



efforts and events of his/her own life. Faced with obstacles on the way to self-development, internals show search activity much more often. Such activity creates prerequisites for finding productive ways of further personal development. Rejection of search activity can lead to "learned helplessness", which leads to stagnation of the personality and degradation.

It was also established that social interest gives rise to a wide range of internal interests and motivations of an individual, thus stimulating his /her self-development.

Self-management focuses its efforts on teaching employees to act together and thereby achieve synergism (Greek: sunergos – together) in work; implies honesty and trust in business relations - ethics in business has been declared a golden rule; strives to form such an organizational culture that would stimulate the self-development of employees and their desire to be equal members of the organization.

In view of this, the most important principles are those that make it possible to fully reveal a person's potential and direct it to the benefit of the organization: development of creative abilities of personnel; involvement of employees in the development of management decisions; reliance on a system of flexible leadership among staff and personal contacts of employees with the external environment; the use of such methods of cooperation with people that ensure their satisfaction at work; permanent and purposeful support of the individual initiative of the company's employees and organizations cooperating with it; honesty and trust in business relations; orientation to high standards of work and

striving for innovations; mandatory determination of the size of the employee's contribution to the overall results; orientation at the perspective of development; reliance on universal values and social responsibility of business towards people and society in general.

Each employee should be allocated a certain budget for his/her self-development; he/she independently chooses the topics necessary for him/her. The ability to take responsibility is encouraged in the organization. The individual training needs of each employee are a central link in planning his/her career.

The acmeological model is the optimal option for personal and professional way to acme, i.e. it is a description of the signs of the results of productivity levels. It is determined by: 1) acmeological criteria - a measure of professional formation assessment; 2) acmeological indicators – professional tasks of a certain type and specific level of professionalism development; 3) acmeological levels - the degree of development of professionalism.

The source of self-movement and development are acmeological contradictions that arise as a result of the interaction of mutually negative tendencies. Internal contradictions are contained within the system itself as a certain integrity, and external ones reflect the interaction of different systems. In acmeological research, contradictions are revealed when it is necessary to reveal the source, causes, types and forms of development. The resolution of contradictions brings the system to a new qualitative level, which, in turn, is characterized by other contradictions, which also become the source of new stages of development.

## **Self-education of manager**

Self-education is an independent increase in knowledge, elevation in skill: the more versatile and deeper the knowledge and experience, the more accurate the choice of decision and actions for its implementation; an involuntary desire of a person or organization to change the internal database and knowledge base is necessary. The goal of self-education is the acquisition of knowledge and skills necessary to improve the quality of life, the development of the ability to self-organize and organize.

To organize self-education, it is necessary to use the manager's working hours. The organization of self-education consists of the following stages: goal setting; determination of priorities (main directions); choosing a method and ensuring the regularity of work on oneself. Self-education can be carried out in the usual forms of public education (higher, secondary and professional education) on the basis of state and private educational institutions, as well as independently according to individual methods.

## **Self-upbringing of manager**

The purpose of self-upbringing is the self-management of the individual, a conscious, purposeful, creative transformative activity, during which the individual, by voluntary efforts, in accordance with the chosen goal, in accordance with the requirements of external circumstances, develops in himself/herself socially and personally significant natural gifts and abilities, new qualities, freeing himself/herself from habits and properties that hinder his/her self-realization and success. The whole process of self-education is expressed

in the search for answers to three key questions: what was I? what did I do? what have I become?

Self-upbringing requires a developed intellect, professional knowledge and extensive erudition.

### **Self-awareness of manager**

The goal of self-awareness is to know oneself as a person, as a leader, one's properties and capabilities, one's strengths and weaknesses, awareness of one's relationships with other people, mastering images, ideas and objects of the objective world, an attempt to understand the meaning of life and career, in his/her inner world, in his/her purpose and calling. The main condition for self-knowledge is self-evaluation in comparison with other people.

Self-awareness includes knowledge of the following components: the meaning of life, vocation, interests, needs, motives, ideal (the image of the "inner goal" and activity); dreams (imagination directed to the future, to the perspective of life and activity); convictions (judgments and thoughts understood and felt by a person, the truth of which he/she does not doubt and which he/she is guided by in his work); faith in oneself and one's abilities. Toolkit of self-awareness include concentration – focusing and partial fixation of attention on some internal or external object; contemplation - sensory cognition related to receiving information about oneself through the senses and the formation of sensations, perceptions and representations; observation - purposeful, planned perception; imagination - the creation of images - representations of the new, that is, what a given person did not perceive

in the past, what he/she had not encountered before, the emergence of a visual image of what is yet to be created; intuition is an inner vision, an inner voice, a conviction that you need to act in a certain way.

## **2. Aspects of self-organization and self-improvement of manager.**

### **Self-organization of the manager**

The goal of self-organization is mastering the methodology and methods of organizing life and activities, developing skills and abilities through self-learning, self-education, self-control, etc. Self-organization includes the following components: the ability to self-analyze, self-control, self-regulation, the ability to predict, purposefulness, independence, determination, perseverance, courage, energy, initiative, self-control, self-restraint, self-criticism, self-discipline, patience.

### **Self-improvement of the manager**

Self-improvement includes personal changes, emergence of new views, feelings. These personality changes are the development of your "I".

Above "I" are your positive traits. Tip: Recognize your positive qualities, but avoid complacency.

Below "I" are your negative traits. Tip: don't deny that you have negative traits, because you are hindering the process of self-improvement

The main direction of self-improvement is the development of independent thinking skills, the development of one's own ideas based on one's own experience. This direction involves the development of own ideas based on the information received, communication with other people and feedback. The main methods of self-improvement, contributing to the achievement of general results in personality development include keeping a personal journal; retrospective review of events; reflections on the events taking place; the ability to listen to one's inner self; development of intuition; courage in using new ideas; experimenting with a new type of behavior; strengthening of willpower; support of the ability to perceive new things; work on the higher and lower self; ways to improve thinking; training in courses; participation in various associations, circles, development of an individual management style, development of communication skills, etc.

The effectiveness of the self-improvement process is considered from the point of view of thinking (our ideas, beliefs, concepts, theories); feelings (our feelings, moods); readiness for action (ability or inability to act depending on the situation). Self-improvement involves analyzing these aspects in a person's life and eliminating any imbalance. It should be noted that the lack of proper awareness of one's personality contradicts the principles of self-improvement. You need to be able to come to terms with your negative traits, but you can't hate yourself because of them: you have to either correct these traits, or try to find an optimal way out of an unfortunate situation when they will not be in your favor. You should also recognize your own strengths, without falling

into excessive self-improvement, as well as self-blame and feigned modesty. So, the concept of self-improvement involves strengthening health, developing skills, motivation, determination, awareness of one's "I" and the purpose of life.

### **Manager's self-realization**

A qualimetric approach to identifying the degree of self-realization

Qualimetric measurements make it possible to form not just requirements for the presence of certain qualities, but the degree of the necessary (normative) presence of qualities in an applicant for a position. Therefore, the deviation of the applicant's actual level of qualities from the normative level provides information not only about the degree of suitability, but also informs the employee about the need for self-improvement or voluntary resignation from the position.

The degree of self-realization depends on the employee's ability to realize his/her creative abilities through making appropriate decisions and applying them in practice. This is revealed on the basis of qualitative models according to the assessment of the employees themselves, which provides information on deviations from the ideal level (full satisfaction). Therefore, on the one hand, it is necessary to organize the human factor as the main productive force for each specific enterprise within the framework of achieving its goals, and on the other hand, to promote the self-realization of each employee and, first of all, those who are functionally engaged in innovative activities (the issue of employee self-realization is directly related to is related to the essence of civil

society, which ensures the self-realization of a person in various spheres of life).

An important element of the manager's potential is the measure of his/her self-realization. Indeed, this important indicator was previously more often declared in documents than actually used as practical characteristics of social phenomena. At the same time, the degree of self-realization of employees at their workplaces in specific societies (collectives) can become an indicator that reflects their ability to activate their activities in general and innovation in particular. The degree of self-realization of employees is measured in three directions by means of a sociological survey. For this purpose, appropriate questionnaires were developed.

1. The first direction, from the point of view of the degree of self-realization, reflects the following internal processes of self-realization of employees: the content of the work performed; the opportunity to see the results of one's work; the possibility of using one's professional knowledge at this position; the possibility of career development; the possibility of improving qualifications or changing professions.

2. The second direction, from the point of view of the degree of self-realization, considers external factors: remuneration for work; fairness in pay; microclimate in the team; management culture; working conditions.

3. The third direction of revealing the degree of self-realization of employees, from the point of view of the degree of satisfaction, is considered in relation to a special category of employees who are



professionally related to innovative activities, in accordance with their functional duties. This category of workers is conventionally called innovators.

The specificity of this category of employees makes it necessary to consider the following factors of self-realization: the opportunity to show initiative and offer non-standard ideas and solutions; atmosphere in the team; availability of motivation for creative activity.

After conducting a sociological survey based on the relevant questionnaires, all three areas of assessment of the degree of self-realization of employees were reduced to a single qualitative complex indicator, considering the importance of each. This indicator quantitatively characterizes directly the innovative potential of personnel at the time of measurement in the diagnostic mode, providing sufficiently objective information for finding specific ways to increase the innovative potential of the enterprise.

### **3. Creativity in the manager's work.**

The most important source of a manager's competitive advantages in modern conditions is the qualitatively new role of a creative worker who combines intellectual capital and the developer of new information products (technologies). The creative nature of the most progressive forms guides the organization of activities not on the basis of the manager's orders, but on the basis of the internal coherence of the guidelines and aspirations of employees.

Accordingly, one of the main problems of forming the creative abilities of modern managers is the development of their leadership qualities and awareness in the art of management, the ability to mobilize people for effective problem solving, using various management tools. It is impossible to mobilize people without the entrepreneurial talent of the leader and without the special qualities of the manager. Knowledge of patterns that arise in the structure of market mechanisms, as well as analysis of the state of the economy, resource potential, and standard of living of the population allow to determine the contours of the paradigm of a new management model.

Many problems and difficulties faced by many enterprises force managers to adapt to the realities of economic life, using various adaptation mechanisms. The talent of a manager is to be able to make non-standard decisions in atypical situations with minimal effort. However, foresight and awareness are not enough for management. More knowledge is needed, and just as an artist must study the laws of light emission and the combination of colors, a manager must thoroughly understand the nature of the material he is working on. According to the scientist, management is called an art precisely because it is based not only on rough empiricism, but also on the achievements of science.

In the modern understanding, the art of management is a systematized theoretical generalization about the best examples (standards), techniques, methods and means of successful managerial activity, a developed ability, on the one hand, to effectively use theoretical knowledge, and on the other hand, to act in those situations

for which science management has not yet developed the necessary recommendations.

The art of management comprehensively characterizes creative management activity, which shows the role of the manager's individual qualities and his/her work style in achieving set goals. Here, developed intuition, experience in creative activity, high education, professionalism, sociability, the appropriate type of thinking, determination, initiative acquire the greatest importance. The art of management is also manifested in the manager's work style, his/her communication with people, and his/her ability to informally influence subordinates. It is the art of management that determines the ratio of formal and informal management, the formation of a manager's authority and the manifestation of his/her leadership qualities.

In addition, the art of management is also manifested in the methods and techniques of development of management decisions, approaches to assessment, analysis of choice problems, and justification of the best decision option among possible alternatives.

So, the activity of a manager who works creatively, possesses the art of management, is characterized by entrepreneurship, the constant search for new opportunities in the field of economy, technology, organizational structure, the use of potential opportunities of the labor team and each performer in particular. The real artistic mastery of a manager is connected to his/her leadership qualities, creative improvisation, the ability to make 79 rational decisions in conditions of

risk and a minimum of information, considering direct and indirect, interconnected and mutually determined factors.

The development of the creative potential of employees within a certain organization requires the presence of a leader. The simplest and most effective method is to organize and conduct a series of seminars on non-standard thinking. If there is a high-ranking manager in the organization, who is passionate about the idea of creativity, he can "infect" others and become a leader in the process of developing creative potential in the organization. This manager does not necessarily have to possess exceptional creative abilities whereas organizational skills and energy are more important for him/her, namely:

- motivation and interest in creativity, but not necessarily possessing creative skills;
- energy and organizational skills;
- being at a fairly high level in the management hierarchy and simultaneously possessing a sufficient amount of time and energy for the development and implementation of programs and projects;
- sociability, the ability to establish a close relationship between different parts of the organization and individual employees, possessing the gift of persuasion;
- the presence of a team of like-minded people, the ability to maintain high motivation in them.

So, leadership is the ability of a person (manager) to exert an effective influence on individuals and groups, directing their efforts to achieve the goals of the organization.

*Questions for self-control*

1. What is the essence of a manager's potential?
2. What areas of development of the manager's potential can be singled out?
3. What is the essence of the concept of "manager burnout"?
4. What limitations and barriers can be singled out in the process of developing the manager's potential?
5. Define the main methods of developing the manager's potential?
6. What role does creativity play in the work of a manager?
7. Define the basic components of the formation of the manager's potential.
8. What are the approaches to the formation of strategic directions for the formation of the manager's potential?

## **Topic 14. Leadership as an element of the manager's personality development process**



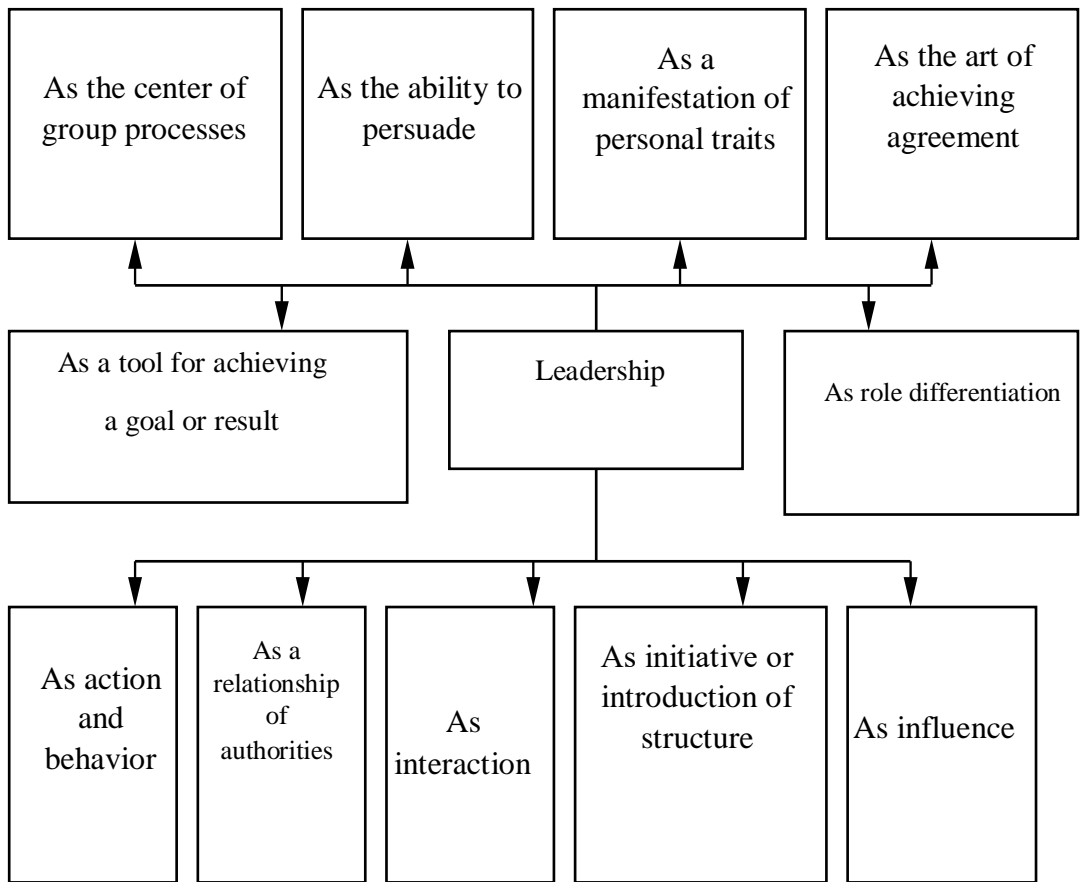
- 1. Concept and essence of leadership.**
- 2. Structure of leadership.**
- 3. Typology of leadership.**
- 4. Classic and modern theories of**

**leadership.**

### **1. Concept and essence of leadership**

Leadership is the ability to influence individuals and groups, directing their efforts to achieve organizational goals, that is, to ensure effective interaction of group members. Leadership is the process of dominance and subjugation, influence and following in the system of interpersonal relations in a group. It is effective leadership that uses new additional sources of power and ensures its new positive consequences: commitment to the organization and readiness for change.

A large number of works on this issue caused the appearance of a large number of interpretations of the term "leadership". Groups of definitions of leadership presented in fig. 14.1.



**Fig. 14.1. Grouping definitions of leadership**

In an ideal case, leadership is evenly distributed between the leader and the group, and in addition, each person strives to increase his/her level of responsibility.

Table 14.1 shows the characteristics of leadership.

Table 14.1

### Essential characteristics of leadership

Characteristics	Content
A leader is one who has followers	Followers are the element that underlies leadership, and its presence gives a person the right to be considered a leader. That is, the followers "create" the leader
Leadership is formed and manifests itself in the field of interaction	Leadership is a product of the relationship between the leader and the people who follow him. Followers notice the actions and deeds of the leader and form their perception of the leader on this basis. Therefore, leadership is better viewed as a sphere of interaction. Leadership is not so much a personal as an interpersonal phenomenon
Leadership is based on authority	Authority is based on qualities that are highly valued by members of a particular group. The presence of these qualities in a leader determines the loyalty of followers to his/her actions, affection and trust in his/her decisions, which he/she can make independently, without consulting the group. Authority has a psychological nature and is formed on the basis of subordinates' common interest in the leader and their belief in his/her special abilities
Leadership is based on informal influence	Possessing authority, the leader also has influence on followers, but this resource of influence has a pronounced personal component (and not just a formal, official one). It cannot be based only on the position of duty, compliance with statutes and job instructions. You cannot force others to follow a leader. This is possible in case of formal management, but not leadership. Unlike a manager, a leader does not command, but suggests
Leadership is built from discrete events - acts of leadership	Although leadership is an ongoing process that appears to be continuous, the interaction between leader and follower occurs as a series of discrete events – interactions that have a beginning and an end. These events occur as brief interactions between a leader and followers in special circumstances. From this follows the conclusion that in order for the manager to be successful as a leader, he needs to pay special attention to what acts of leadership he performs
Leadership is a cognitive construction of perception of followers	Leadership is not a specific quality, it is cognitively "constructed" by followers depending on what actions are associated with their ideas about leadership behavior. That is, for the successful formation of a manager as a leader in a specific social group, it is necessary to study what qualities and behavioral acts are perceived by the members of this group as leadership



In addition to considering the immediate image characteristics of the leader, the surrounding people perceive him/her in the context of four cognitive "models":

a) "one of us". It is assumed that the lifestyle of the leader is identical to the lifestyle of any member of the social organization. A leader, like everyone else, rejoices, is indignant and suffers, life brings him/her pleasant and unpleasant things - this is how the mundaneness of charisma is manifested;

b) "the best of us". It is implied that the leader is an example for everyone, i.e. both as a person and as a professional. In this connection, the leader's behavior becomes an object of imitation for many. This is how the attractiveness of charisma is manifested;

c) "embodiment of virtues". It is believed that the leader is the bearer of higher moral standards. He/she is called to protect the interests of others. This shows the authority of charisma;

d) "justification of our expectations". People hope for stability, share with the organization its social values and ready behavioral actions of the leader regardless of the changing situation. They want the leader to be true to his word, not to allow deviations from the development course approved by the organization - this is how the legitimacy of charisma is manifested.

## **2. Structure of leadership**

An important issue when researching the problem of leadership is the definition of its structure. Nowadays, multidimensional models, which differ somewhat in number and content, are mainly used to describe meaningful characteristics and the general structure.

Leadership covers the three components of the leader, followers and the circumstances in which the leader acts, and it is noted that the psychological view of him/her involves the analysis of the psychological properties of the leader himself/herself, the psychological properties of the people around him/her, as well as the identification of the dependence between the personality of the leader and the situation.

The leadership structure includes five main elements:

- 1) the group in which the interaction takes place;
- 2) the task that the group is trying to solve;
- 3) a leader is an individual with certain leadership qualities, abilities and capabilities, focused on achieving goals significant for the group;
- 4) followers are group members with their own qualities and capabilities to achieve common goals;
- 5) situations typical for group interaction.

The leader is a member of the group, which recognizes his/her right to make responsible decisions in situations that are important, that is, the most authoritative person who plays a central role in organizing joint activities and regulating relationships in the group.

The main functions of a leader are the organization of joint life activities in its various spheres, development and support of group

norms, external representation of the group in relations with other groups, taking responsibility for the results of group activities, establishing and maintaining favorable social and psychological relations in the group.

In order to emphasize the characteristics of a leader and his/ her role in achieving common goals, authors often draw a parallel between a leader and a manager, and identify the differences between them (Table 14.2).

Table 14.2

Differences between a leader and a manager (manager)

Author	Manager	Leader
J. Maxwell	Commands people	Teaches people
	Relies on power	Relies on goodwill
	Causes fear in people	Inspires people
	says "I"	Says "we"
	Scolds for mistakes	Searches for ways to eliminate errors
	He knows how to work	Shows how to work
	Says: "Go!"	Says: "Let us go!"
У. Бєннїс	Supports	Develops
	He is concentrated on the structure	He is concentrated on people
	regulates	Introduces innovations
	Supports the status quo	Changes the existing order
	Relies on control	Sows trust
	Follows the leaders	He gives rise to traditions
	Considers everything in the near future	Has long-term plans
	Follows orders	He is guided by own values
	Asks the question "how?" and "where?"	Asks the question "what?" and "why?"

Followers are individuals, communities, or social structures transformed into a structure capable of sequential or parallel, coordinated actions to achieve one common goal. That is, followers should actively interact with each other on the way to a common goal. The structure operates on the goals and meanings broadcasted by the leader and forms expectations from the leader based on this. Although the followers are subordinate to the leader, the influence of the follower on the leader is comparable to the reciprocal influence.

Tasks are formed according to the purpose, and the tasks themselves determine the functions. Tasks direct the activities of the group and make demands on the leader. The range of tasks is diverse: from routine, repeated every day to creative, problematic ones.

A situation is a specific set of circumstances that affect leadership at a specific time.

The situation is characterized by: tasks to be solved; labor processes; environment; team members

Most often, a person becomes a leader due to his/her active adaptation to the conditions of a constantly changing environment, the ability to use his/her qualities in the existing situation and establish interpersonal relations "situation - leader - followers".

The group is one of the main elements of the social structure and is a set of people united by any significant feature - joint activity, economic, demographic, ethnographic, psychological characteristics. A group in organizational leadership means the staff of the organization or a part of this staff with its structure of formal and informal relationships.

A group is characterized by: size, roles, status, interpersonal relations, cohesion, interaction, goals, group development, and norms. The composition of the group and its condition affect the nature of leadership, leaders and the stability of their position.

### **3. Typology of leadership**

Many scientists were engaged in the study and establishment of types and classifications of leadership. The typology of leadership includes a set of approaches to the classification of types and directions of leadership according to various characteristics. It is necessary, first of all, for a systematic description and diagnosis of the actual state of leadership.

Leadership in the organization is characterized by the dominance of one of the three components of interaction - business, emotional and informational.

Business leadership is characteristic of organizations that solve business tasks; it is based on such qualities as high competence, the ability to solve organizational tasks better than others, business authority, and the greatest experience in this field of activity. Business leadership has the greatest impact on management. It is good to work with a business leader, he/she can organize business, establish the necessary business relationships, and ensure the success of the business.

Emotional leadership arises in informal social groups on the basis of human sympathies - the attractiveness of the leader as a participant in

interpersonal communication. An emotional leader inspires trust in people, radiates kindness, instills confidence, relieves psychological tension, and creates an atmosphere of psychological comfort. An emotional leader is a person to whom everyone in the group can turn for sympathy.

Informational leadership is characterized by the fact that the person knows a lot, can explain and help find the necessary information.

The best leader is one who combines all three qualities, but such a versatile leader is rare. The most common combination of two components: emotional and business or informational and business.

Studying different types and styles of leadership does not give an opportunity to determine the best of them, but it allows you to get an idea of their advantages and disadvantages and areas of application.

#### **4. Classic and modern theories of leadership**

Leadership became an object of study when management was first studied at the beginning of the twentieth century.

As most of the theories of leadership of the 20th century, which have practical application value, fit into the framework of the approaches given in the table. 14.3.

Table 14.3

## Basic approaches to leadership theory

Approach	Essence
Personalistic	It is aimed at studying the leader's personality and his psychological qualities, which determine the granting of leadership status to him
Situational	It is aimed at studying the situational context of the leadership process
Behavioral	It is aimed at studying the direct behavior and actions of the leader, the features of his interaction with followers, including his influence on the motivation of followers
Social-cognitive	It is aimed at studying the peculiarities of the perception of the leader by the followers and the patterns of formation of his leadership image
Value	It is aimed at studying the peculiarities of the leader's formation and transformation of individual-personal and intra-group structures (the value-worldview sphere of followers, the group's corporate culture) in the process of leadership

The earliest theories of leadership appeared in the first half of the 20th century within the framework of a personalistic approach focused on the study of leadership qualities (traits) of leaders.

The leading hypothesis behind the "trait concept of leadership" was the assumption that outstanding leaders are such because they are born with traits that distinguish them from other people. Accordingly, in order to understand why some people become leaders and others do not, it is necessary to study the traits (qualities) of leaders. Although in the

future, the theory of traits did not justify itself: the attempt to single out exceptional leadership qualities was unsuccessful, because it became obvious that there are simply no qualities that unite all leaders. Some of the models of leadership qualities deserve attention, identifying general qualities that increase leadership potential.

As an alternative to personalistic theories in the first half of the 20th century a situational approach to the study of leadership began to develop. The efforts of researchers who worked in this direction were aimed at studying the specifics of the impact of situational factors on leadership effectiveness. Proponents of situational theories emphasized the relativity of leadership traits, they noted that different circumstances may "require" qualitatively different leaders. That is, in certain situations of the group's activity, individuals who possess the most sought-after qualities at that moment manifest themselves as leaders. Accordingly, in order to understand the nature of leadership, it is necessary to study the situations in which certain leaders are formed.

Since the 1930s, the behavioral approach to the study of leadership, which is based on the study of the leader's behavior and his/her interaction with followers, began to develop actively. Proponents of the behavioral approach believed that followers, choosing a leader, first of all analyze his/her behavior and actions. Therefore, in order to understand the nature of the leadership phenomenon, it is necessary to study the manifestations of the leader's behavior.

Since the beginning of the 1980s, the number of studies conducted within the framework of the social-cognitive approach, where the



phenomenon of leadership is considered as a product of the cognitive processes of followers and the leader himself, has been constantly increasing. The subject of consideration are the peculiarities and regularities of the formation of the perception of an individual as a leader by his/her followers (attribution processes), as well as the social-cognitive attitudes and worldview of the leader himself.

Value theories of leadership have developed relatively recently (1980-1990). Value leadership can be considered as a special type of fusion of organizational and emotional leadership, developed to a qualitatively higher level. According to the value concept of leadership, the most effective management of people is management through their worldview and values. Accordingly, the leader becomes the member of the group who forms and supports the common values of the group and ensures the involvement and commitment to these values of other group members.

And today the problem of leadership has not lost its relevance. It has become especially popular among American researchers, who have developed a significant number of new approaches to understanding the essence of leadership and leadership theories. Their research creates a theoretical basis for the development of leadership competence of an individual.

R. Dilts, E. Deering, and J. Russel, the authors of the alpha leadership theory, note that leaders of outstanding organizations have qualities that can be grouped into processes such as anticipation, alignment, and action. The authors also propose nine principles of alpha

leadership, which they grouped according to the processes listed in the table. 14.4.

*Table 14.4*

**The content of the Alpha-leadership theory**

<b>Process</b>	<b>PRINCIPLE</b>
anticipation	Detection of weak signals
	Liveliness of the mind as a key factor of success
	Release of resources
alignment	Leadership as personification
	Through the attitude towards the goal
	Creation of effective culture
action	Leadership 80:20
	Prepare, shoot, aim
	Hot pursuit (and a timely stop)

So, according to the theory of alpha leadership, leadership competence consists of the ability to: anticipate that is, notice the slightest signs of changes, emerging trends, quickly respond to changes and create flexible organizations that quickly respond to new environmental requirements; align, i.e. align one's own values and needs with the values and needs of other people in order to create coalitions and balanced organizations capable of effectively achieving goals; act, that is, create conditions for achieving the goal and move towards it.

A fairly well-known theory of leadership, which still has a significant number of supporters today, is the model of emotional intelligence. Emotional intelligence is considered as the ability to effectively manage oneself and one's relationships with other people,

which is based on four fundamental abilities: self-analysis, self-management, social adaptation and establishment of social connections (Table 14.5).

Table 14.5

**Components of "emotional intelligence"**

<b>Components</b>	<b>Ingredients</b>	<b>Contents</b>
Self-analysis	Emotional self-analysis	The ability to recognize and understand one's own emotions, recognize their impact on productivity, relationships with other people
	Sober self-esteem	A realistic assessment of one's strengths and weaknesses
	Arrogance	A positive sense of self-worth
Self-management	Self-control	Ability to control destructive emotions and impulses
	Constancy	A consistent display of honesty and integrity
	Consciousness	The ability to be responsible for one's actions and obligations
	Adaptability	The ability to adapt to changing conditions and overcome obstacles
	Achievement orientation	Striving to meet high internal standards
	Initiative	Willingness to take advantage of new opportunities
Social adaptation	Empathy	The ability to feel other people's emotions, understand their point of view and take an active interest in their concerns
	The ability to navigate in social life	The ability to recognize the currents of social and political life, to build systems of connections for decision-making
	Ability to navigate the service system	Ability to recognize and meet customer needs

Establishment of social connections	Ability to lead	The ability to take responsibility for a cause and convince others to participate in it
	Ability to influence	Ability to use various tactical techniques of persuasion
	Ability to develop others	The ability to recognize the inclinations of other people and guide and develop them
	Ability to communicate	Ability to listen to others and express one's thoughts clearly, persuasively and gracefully
	Propensity to changes	The ability to preach new ideas and lead others in a new direction
	Ability to soften conflicts	Ability to defuse, harmonize conflicts and reconcile parties
	Ability to create personal connections	Ability to establish and maintain personal connections and relationships
	Ability to work in a team	Ability to develop cooperation and create teams

Leadership competence according to the model of emotional intelligence consists in the ability to self-control, persistence, self-motivation for activity, understanding one's own emotions and the emotions of other people and taking them into account in maintaining favorable relations with the environment.

J. Welch's "4E" leadership model combines four key qualities that an ideal leader should possess: energy possession, energy infection from others, energy to win, execution of plans. J. Cramer provides a detailed model of leadership, which consists of 12 indicators: real leaders act directly; they are confident in their business qualities; true leaders think globally; they are client-oriented; they welcome reforms and despise

bureaucracy; true leaders are good communicators and subtle empathis; they create effective teams; strive to achieve the goals of the organization; they have enough energy and the ability to charge others with it; they have "contagious enthusiasm"; they achieve goals and deliver results; the true leaders love their work. That is, leadership competence consists in the ability to constantly move forward, inspire others to complete tasks, make decisions in difficult situations, and achieve set goals.

In K. Cashman's theory of internal stimulation of leadership, it is noted that almost every person has so-called "internal leadership". Accordingly, leadership competence is achieved through mastery in such areas as: self-awareness, goal setting, change management, interpersonal relationships, being, finding balance, and the ability to act.

N. Tichy's Leadership Engine Theory is based on the idea that for effective leadership at all levels of an organization, senior leaders must nurture leaders at lower levels of management with a "transmitted vision"—a set of business ideas, values, emotional energy, and determination that must be agreed upon. Therefore, leadership competence consists of the ability to educate new leaders.

R. Charan, S. Drotter, and J. Noel proposed a scientific model of the "leadership pipeline" or "personnel escalator." It offers a kind of promotion of leaders along the "ladder of mastery". This concept involves the advancement of a leader along six "ladders of mastery":

- 1) from managing oneself to managing others;
- 2) from managing others to managing managers;

- 3) from managing managers to a functional manager;
- 4) from a functional manager to a business manager;
- 5) from business manager to group manager;
- 6) from the group manager to the manager of the organization.

Leadership competence includes mastering the skills of self-management, management of others, management of managers, functional management, business management, group management, management of organization. According to the theory of indirect leadership by R. Fisher and A. Sharp, it is not always necessary to take the formal position of a leader to implement the process function of leadership, so the leader must master some skills that are necessary for the implementation of indirect leadership. The following leadership competencies are necessary for indirect leadership: the ability to clearly formulate the desired results; perspective vision; establishment of cooperation relations; mastering new forms of learning.

According to the theory of connecting leadership by J. Lipman-Blumen, a modern leader must be able to establish connections between his own motivations and goals, as well as the goals and motivations of other people. He believes that in order to lead, a leader must master such abilities as: personal authenticity and responsibility, political pragmatism based on ethical principles, skills in building a community of like-minded people, orientation to the long-term perspective, leadership based on trust, providing opportunities and promotion, finding the meaning of life. These abilities form leadership competence.

According to the theory of leadership through the management of paradoxes by F. Tropaars and C. Hampden-Turner, the leader has to balance between universalism and specificity in order to solve problems that do not have an unambiguous solution; individualism and collectivism; hard and "soft" standards; emotionality and restraint; prescribed and acquired statuses; external and internal locus of control. To manage paradoxes, a leader must constantly learn, expand his worldview, his leadership competence consists of the ability to adapt to changes, solve problems in the processes of anti-crisis management, and master the skills of practical methods of effective management in conditions of risk and uncertainty.

The theory of "leadership flexibility" presented by V. Joyner and S. Josephs, is devoted to the idea of developing the flexibility of a leader. They showed that a leader develops his flexibility by going through 5 stages: "expert", "achiever", "catalyst", "co-author", "synergist". A leader, consistently developing abilities from applying a tactical approach to a holistic vision, can skillfully face the fast-moving competitive environment.

The idea of distributed leadership by D. Bradford and A. Cohen is that a group or team does not have to have one leader at all. In conditions when a certain competence is especially needed, its bearer becomes a temporary leader who coordinates the work of the group at a certain stage. Leadership competence consists in the ability to effectively interact, delegate, master communication skills.

The relevant theory of leadership today is leadership by overcoming conflicts by M. Gerzon. It requires the leader to abandon the traditional "us versus others" mindset. Now what new skills are needed which previous leaders did not develop at all, i.e. skills that allow one to combine personal and professional qualities to transform serious conflicts into promising opportunities for cooperation and innovation. Leadership competence is a synthesis of the abilities of a holistic vision, systemic thinking, the study of conscious communication, dialogue, building bridges, and innovation.

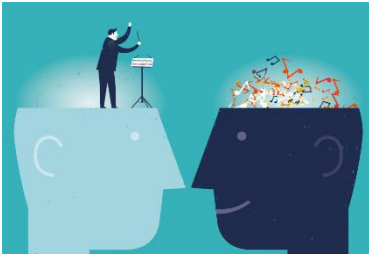
"Blue ocean leadership" is a new theory by C. Kim and R. Mauborn, where they applied their previously developed "blue ocean" strategy to the topic of leadership. They called the untapped talents of employees a "blue ocean" and proposed a 4-step approach to unlocking their abilities by developing leaders at all levels of the organization. To do this, it is necessary to evaluate the daily activities of existing leaders, develop an ideal profile of an ideal leader and a job description, conduct a job fair within the organization and select the worthiest ones to fill leadership positions, and establish new leaders in new positions with newly developed powers and responsibilities. According to the authors of the concept, this approach shows a high result and significant involvement of the entire organization in labor activities.

The only way to succeed today is to tap into the innate leadership potential that lies within every employee. That is, modern leadership requires constant development of one's own independent leadership skills.



Leadership theories confirm the thesis that leadership is a complex and multifaceted phenomenon. To be a leader, one should constantly learn, expand one's worldview, and develop leadership competence.

## Topic 15. Leadership development



### leadership development

1. **Diagnosis of leadership.**
2. **Development of leadership competencies.**
3. **Application of training methods of**

### 1. Diagnosis of leadership

Leadership development begins with self-knowledge. In this sense, many experienced leaders claim that leadership begins "within the person himself/herself", everyone has leadership skills, but they are used to different degrees. For this purpose, it is necessary to carry out diagnostics to identify the qualities of a leader with the help of special methods of researching the psychological features of leadership. In the process of forming students' leadership qualities, it is important to use scientifically based diagnostic methods.

The use of the term diagnostics to assess the level of development of qualities that ensure effective social interaction allows focusing attention not only on identifying the problem, but also involves practical actions to manage the system.

Diagnostics is a scientific and practical activity of recognizing the state of an object from the point of view of its compliance with the norm, carried out on the basis of classifying a given object under a class known

to science, which aims at forecasting, returning the system to a state of normal functioning or maintaining it in this state.

An analysis of leadership research methods shows that the sociometric method in its various modifications is used to identify leaders. It mainly identifies not leaders, but emotionally attractive individuals. Among the methods aimed at identifying informal leaders in the team, test methods have become particularly popular.

A significant number of methods have been developed to study the problem of formation of leadership qualities (Table 15.1).

Table 15.1

Leadership research methods

<b>Name of the method</b>	<b>Authors</b>	<b>The essence of the methodology</b>
Test questionnaire "Diagnosis of leadership abilities"	E. Zharikov, E. Krushelnytskyi	It is necessary to answer 50 questions (choose one of the options). As a result of scoring, the degree of expression of leadership qualities is determined
Test questionnaire "Diagnosis of leadership abilities"	A. Zhuravlev, V. Zakharov	The questionnaire contains 16 groups of statements characterizing various aspects of interaction between the manager and the team. The methodology is aimed at determining the management style

<p>Methodology of studying the leadership styles</p>	<p>R. Bales, K. Schneier, modification - T. V. Bendas</p>	<p>The methodology allows studying two styles of leadership behavior - business (that is, task-oriented) and socio-emotional (that is, relationship-oriented). Subjects rate the leader's behavior in terms of 12 forms of behavior using a scale from 1 to 10: 1 point – if the specified feature of behavior is manifested very rarely; 10 points – most often; 0 points - if the evaluated leader does not have such a feature</p>
<p>Diagnostics of functional leadership in small groups</p>	<p>N. Fetiskin, V. Kozlov, G. Manuylov</p>	<p>The methodology makes it possible to determine the place of each member of the group in the system of interpersonal relations, to see his/her psychological status (leader (universal, functional); those who are preferred; outsiders; those who are not preferred), as well as the hierarchy of statuses of all members of the group</p>
<p>Self-assessment of leadership</p>	<p>N. Fetiskin, V. Kozlov, G. Manuylov</p>	<p>The express test allows you to determine the current level of manifestation of leadership in joint activities</p>
<p>Leadership effectiveness</p>	<p>R. Nemov</p>	<p>The questionnaire assesses not a person's leadership qualities, but his/her possible practical activity as a leader from the point of view of potential effectiveness. The test consists of 40 questions the answer to which is "yes" or "no"</p>

In many scientific works, the authors emphasize the need to study not only leadership qualities, but also the motivational aspect.

For actual leadership activity, the need for self-realization, which is accompanied by motives and incentives: one's own well-being, social prestige, and the desire for personal achievements, is dominant. The need for self-realization is manifested through the motive of power and motives-incentives of striving for personal achievements, avoiding failures, and self-development. During the study of the motivational and need sphere of the structure of leadership activity, the following methods can be used: modification of A. Mehrabian's questionnaire test for measuring achievement motivation proposed by M. Magomed-Eminov; modification of A. Mehrabian's test-questionnaire of affiliation motivation proposed by M. Magomed-Eminov; the "MAS" questionnaire, proposed by M. Kubyshkina and aimed at identifying the motivation to achieve the goal, the desire for rivalry and the desire for social prestige; the "motive of power" technique, intended for researching the level of expressiveness of the motive of power; a questionnaire on the realization of the need for self-development, intended for research on the level of expressiveness of the desire for self-development; B. Basa's method of diagnosing personality orientation and other methods.

The information obtained as a result of the diagnosis serves as a basis for choosing directions for the development of leadership competence of an individual.

## **2. Development of leadership competencies**

Many years of research carried out in the field of leadership led to the emergence of a significant number of developments and recommendations on the training of leaders, development of leadership qualities, leadership competence, etc.

Let's consider the recommendations of foreign and domestic scientists regarding the development of leadership competence.

S. Covey suggests developing the following seven “habits”:

1. "Be proactive." S. Covey divides people into proactive and reactive. Reactive people are easily influenced by living conditions, social environment, opinions of friends, etc. Proactive people "do not shift the blame for their behavior to circumstances, environment, or its influence. Their behavior is a product of conscious choice." Proactive people are guided by values and purpose, they are not only proactive, but also responsible.

2. "Start with a goal in mind." All business should be started with a clear understanding of the ultimate goal. "It means to understand where you are going, so that you can see where you are now, so that all steps you take are always in the right direction."

3. "First of all - the most important." Being truly effective means being able to prioritize. It should be remembered that urgent is not always important. Therefore, it is necessary to organize your day and live each week according to your own beliefs and goals.

4. "Win/win thinking". There are five types of thinking: "win/win", "win/lose", "lose/win", "lose/lose", "win". You should be oriented only on "win/win" as a guarantee of further relations. "Building a mutually beneficial relationship is difficult, but possible if you remember that everything is enough for everyone."

5. "Understand yourself, and then seek understanding." Communication is the most important skill in life. Effective interaction depends on the ability to hear the other person, try to understand and sincerely empathize with them. It is about the skills of "empathetic listening" - the ability to look at the situation through the eyes of the interlocutor.

6. "Create energy." Synergy is an interaction that results in the whole being greater than the sum of all its parts. Synergy is "teamwork, team building, development of creativity and unity with other people." You can always support it in yourself: appreciate the differences that exist between you and other people and respect their opinion, do not take insults at your expense, be brave and do good to people.

7. "Sharp saw". "Sharpening the saw" means regularly, consistently, and wisely applying the four dimensions of our nature: physical (exercise, healthy food), social/emotional (empathy, synergy, service), mental (reading, planning, visualization), and spiritual (breathing exercises, meditation).

J. Maxwell distinguishes the following nine stages of growth and improvement of the relationship between a leader and followers, which are realized in a small group:

1. Personal competence. As the competence of group members increases, the leader decreases his /her influence, control, and guardianship, because mature people need full agency within certain limits.

2. Support in solving problems. The leader stimulates and supports group members in solving both group and individual problems.

3. Attention. The leader devotes time and attention to each member of the group. Uses various forms of encouragement, stimulation, persuasion.

4. Determination of boundaries. A boundary-setting leader motivates team members according to organizational roles that match their perceptions and efforts and inspire enthusiasm.

5. Independence and professional growth. The leader creates the conditions for independent direction of the follower's activity, if the follower reaches a certain degree of maturity.

6. Feedback. The leader provides a feedback context for himself/herself if the followers see him as a person capable of approval, support, help and if their needs are at least partially satisfied.

7. Expansion of autonomy. The leader allows the group members to extend their autonomy if they show a high enough level of maturity. Autonomy satisfies people's need to feel needed, to feel their value, that is, it is a means of motivation for active activity.

8. Education. A leader shows attention, support, care and provides internal motivation to followers.



9. Commitment and loyalty. At this stage, followers achieve a primary connection with the leader and the organization, as they consider themselves part of the organization and realize their ability to influence everything that happens in it.

In his research, T. Gura pays special attention to the development of the leadership potential of the personality of the future specialist. The researcher singled out nine main conditions for the formation and development of the leadership potential of a future specialist:

- 1) achievement of a high level of professional competence;
- 2) morality, decency, high level of culture of the future leader;
- 3) focus on preserving the surrounding world and maintaining harmonious relationships in the team;
- 4) self-discipline and focus on self-development;
- 5) broad outlook, erudition, professional culture of the leader;
- 6) availability of pedagogical knowledge for mentoring;
- 7) economic competence;
- 8) creativity and innovative thinking style;
- 9) developed intuition and ability for critical thinking.

O. Romanovsky considers the formation of leadership qualities as "the process and result of the development of the internal structure, that is, the psychological organization of the individual in the unity of their manifestation with personal organizational and communicative readiness for external leadership."

He declares the following components of effective leadership: analytical intelligence (IQ). Most effective leaders have above-average

analytical intelligence, which helps them think strategically; emotional potential (EQ). People with high emotional sensitivity are much more likely to become effective leaders. Such skills help them in this, such as: the ability to actively listen, understand non-verbal communication and adapt to a wide range of emotions; energy (VQ). This is the coefficient of vital energy, that is, the ability of managers to energize themselves and those around them. The higher the VQ, the stronger a person's desire to develop and control his/her life. That is, a fairly high level of VQ is a prerequisite for success.

In modern conditions, which are characterized by the instability of the external environment, the complication of intra-firm relations, managers are required to adopt original, creative solutions, flexibility, and innovation. Therefore, for the development of leadership at domestic enterprises, it is necessary to implement the following recommendations: to ensure constant training of managers, their mastery of problem-solving skills in the processes of anti-crisis management, skills of practical methods of effective management in conditions of risk and uncertainty; to develop in managers such personal qualities as: self-control, perseverance, self-motivation for activity, understanding of one's own emotions and emotions of other people; to develop the skills of effective interaction, delegation, and communication skills in managers.

In addition, one should not forget about the achievements of the most relevant leadership theories in modern management, listed in the table. 15.2.

Table 15.2

Suggestions for leadership development in the organization

<b>THEORY</b>	<b>ESSENCE</b>	<b>PROPOSALS</b>
<p>Model of emotional intelligence of D. Golman</p>	<p>Effective leadership is facilitated by the possession of emotional intelligence - the ability to explain one's own emotions and the emotions of others in order to use the received information to achieve goals. Components of emotional intelligence are self-awareness, self-regulation, motivation, empathy, social skills</p>	<p>To master emotional intelligence, it is necessary to master such personal qualities as self-control, perseverance, self-motivation for activity, understanding one's own emotions and the emotions of other people and taking them into account in maintaining favorable relations with the environment</p>
<p>The theory of internal stimulating leadership of K. Cashman</p>	<p>Almost every person has so-called "inner leadership" that can be developed</p>	<p>Inner leadership can be developed by every person if he/she achieves mastery in the following areas: self-knowledge, goal setting, change management, interpersonal relationships, being, finding balance, the ability to act</p>

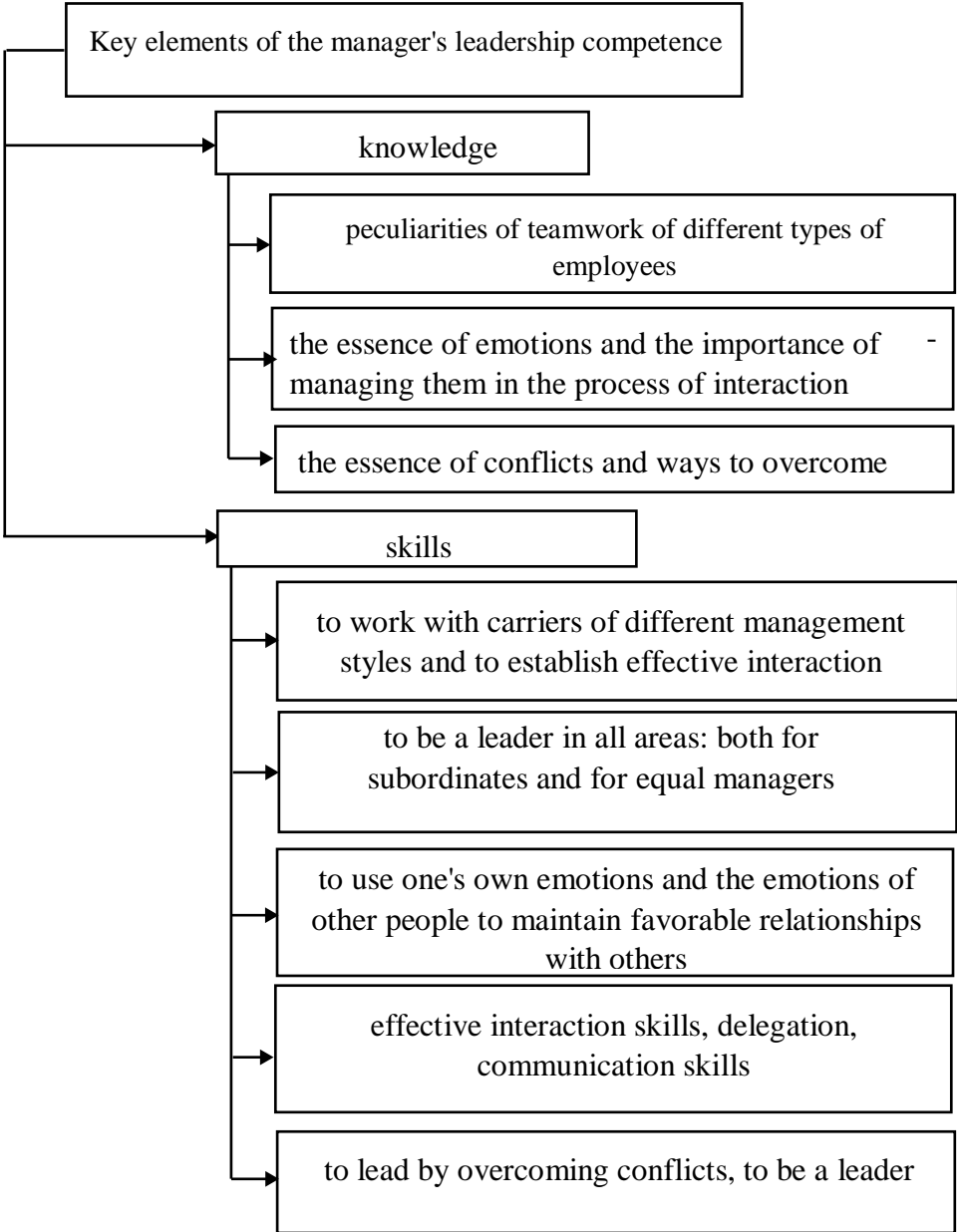
<p>The theory of the engine of leadership by N. Tichy</p>	<p>To ensure effective leadership at all levels of the organization, senior leaders must nurture leaders at lower levels of management</p>	<p>Nurturing of new leaders is achieved through a "transmitted vision", i.e. a set of business ideas, values, emotional energy and determination that must be aligned</p>
<p>Theory of mediated leadership of R. Fisher and A. Sharp</p>	<p>To implement the process function of leadership, it is not always necessary to occupy a formal position of a leader, therefore the leader must master some skills that are necessary for the implementation of indirect leadership</p>	<p>In order to implement indirect leadership, the leader must learn: a clear formulation of the desired results; perspective vision; establishment of cooperation relations; mastering new forms of education</p>
<p>The theory of connecting leadership J. Lipman-Blumen</p>	<p>A modern leader must be able to establish connections between his own motivations and goals, as well as the goals</p>	<p>To exercise leadership, a leader must master such tools as: personal authenticity and responsibility; political pragmatism is based on</p>

	<p>and motivations of other people</p>	<p>ethical principles; skills of building a community of like-minded people; orientation to the long-term perspective; leadership based on trust; providing opportunities and promotion; search for the meaning of life</p>
<p>Leadership theory through management of paradoxes of F. Tropaars and C. Hampden-Turner</p>	<p>To solve problems that do not have an unambiguous solution, the leader has to balance between universalism and specificity; individualism and collectivism; "hard" and "soft" standards; emotionality and restraint; prescribed and acquired statuses; external and internal locus of control</p>	<p>To manage paradoxes, a leader must constantly learn, expand his worldview, be able to adapt to changes, master the art of solving problems in the processes of anti-crisis management, the skills of practical methods of effective management in conditions of risk and uncertainty</p>

<p>Concept "leadership pipeline"</p>	<p>This concept involves the advancement of the leader along the "ladder of mastery" from self-management to management of organization</p>	<p>The leader must master the skills of self-management, management of others, management of managers, functional management, business management, group management, management of organization</p>
<p>The idea of distributed leadership of D. Bradford and A. Cohen</p>	<p>A group or team does not necessarily have to have one leader. In conditions where some competence is especially needed, its bearer becomes a temporary leader who coordinates the work of the group at this stage</p>	<p>The leader must master the skills of effective interaction, delegation, and communication skills</p>

Modern managers are increasingly perceived as innovative managers who must have in-depth knowledge in various fields, and this knowledge must be constantly updated and updated. Since it is quite difficult to combine all these characteristics in one person, a manager-

leader should learn to be a leader of leaders. The leadership competence of future leaders can be described using the descriptors shown in Fig. 15.1.



The technology of development of leadership competence should include the following stages: first, obtaining new information about

oneself, one's ability and readiness for leadership and the peculiarities of one's interaction with other people; secondly, rethinking ideas about oneself and one's behavior; thirdly, building new forms of leadership behavior and regulation of interpersonal interaction; fourth, consolidation of positive experience in conventional situations of managerial interaction.

### **3. Application of training methods of leadership development**

The process of formation of effective leadership skills is provided with the help of special training methods. If we consider organizational leadership, then we are talking about the training of personnel, which can be carried out both in the workplace and outside the workplace.

The methods of in-house training are instruction, rotation, directed acquisition of experience, mentoring, mentoring-supervision, situational mentoring, formal mentoring, informal mentoring, coaching, internship, training in project groups.

Methods of learning outside the workplace include lectures, business games, staging, trainings, the method of solving practical situations (cases), methods of solving problems using models, working groups, conferences, seminars, round tables, discussions, meetings with management, excursions, private teaching.

There are also training methods that combine aspects of on-the-job and off-the-job training. These include: experiential learning, guided



demonstration and practice, programmed courses, learning by doing, computer-assisted learning.

In order to become a leader, you need practice and experience, which allows you to use psychological training as an important element of professional training. Any information, remaining unrelated to experiences from the practical use of the acquired knowledge, is more prone to the influence of the mechanisms of forgetting, displacement or simply further rejection. The training creates the possibility of immediate correlation of the acquired knowledge and activities, emotional habitation of new behavior patterns and related results.

Therefore, group psychological training may well act as an effective means of developing leadership qualities. An individual's successful leadership experience in simulated training situations can contribute to the comprehensive development of leadership qualities, increase his/her motivation for leadership, form his/her leadership image and authority in the eyes of the group, which can later be transferred to real life and professional situations.

Complex development of personal qualities of managers should be aimed at forming their psychological readiness for leadership, which structurally covers motivational, cognitive and activity components.

Motivational readiness for leadership is characterized by internal readiness to take on the role of leader, desire to perform leadership functions, interest in organizational activities, etc.

Cognitive readiness for leadership includes understanding of professional tasks, knowledge of leadership techniques and strategies,

algorithms of organizational activities in a group, ability to think practically, etc.

Active readiness for leadership implies a developed ability for practical leadership actions, the ability to use existing knowledge about leadership in the practice of professional interaction, the speed of finding the optimal solution to management tasks, etc.

The presence of such an internal integral psychological readiness for leadership ensures that the individual successfully fulfills the role of a leader in practice and is accepted as a leader by other members of the group.

## **Conclusions**

The formation of students' leadership qualities should be preceded by diagnostics, which involves the use of scientifically based diagnostic methods. Among the methods aimed at identifying leaders in a team, determining the level of development of leadership qualities of an individual, etc., test methods have become particularly popular. The most famous among them are the test-questionnaire "Diagnostics of leadership abilities", the questionnaire "Diagnostics of operational characteristics of leadership and leadership", the questionnaire "Methodology of studying leadership style", the questionnaire "Diagnostics of functional leadership in small groups", the questionnaire "Self-assessment of leadership", the questionnaire "Effectiveness of leadership". The information obtained as a result of the diagnosis serves

as a basis for choosing directions for the development of leadership competence of an individual.

Modern science and practice have developed a significant number of developments and recommendations regarding the training of leaders, development of leadership qualities, leadership competence, etc. Thus, S. Covey suggests developing seven "habits" of a leader, J. Maxwell - nine stages of growth and improvement of the relationship between a leader and followers, T. Gura – development of leadership potential. Modern researchers emphasize that nowadays a manager must be a leader in all directions: both for subordinates and for managers equal in status; must use his own emotions and the emotions of other people to maintain favorable relations with the environment; teach leadership of others, develop skills of effective interaction, delegation, communication skills; exercise leadership by overcoming conflicts, be a leader of leaders.

The process of forming effective leadership skills is provided with the help of special training methods, one of which is psychological training. An individual's successful leadership experience in simulated training situations can contribute to the comprehensive development of leadership qualities, increase his/her motivation for leadership, form his/her leadership image and authority in the eyes of the group, which can later be transferred to real life and professional situations.

Complex development of personal qualities of managers should be aimed at forming their psychological readiness for leadership, which structurally covers motivational, cognitive and activity components. For

this purpose, the following methods of group work and training procedures are used in the training: diagnostic procedures, information, psych gymnastic exercises, the method of playing roles, group discussions, story role-playing games, methods of individual and group reflection.

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