

Context for Management Report

Background

Because of confidentiality agreements, I've had to be innovative to create samples for my portfolio. I've written and edited technical reports in the workplace. Because I wanted to include a report in my portfolio, I made up a fake client and consulting project where a requirement or deliverable was a report. The following report does not consist of technical content but is a business report with the same requirements as most reports.

- **Audience:** Managers at Fetron, Inc., the company that requested management consulting services.
- **Percentage of I wrote:** 100%.
- **Original content or revised content:** The document is my original writing.
- **Resources for drafting content:** The references used for drafting the content are listed in the document in the last section.
- **Content editing:** I edited the document myself as someone confident in my editing abilities because of my background. The document underwent heavy editing.
- **Style guide usage:** A style guide was used to write this document but not a company style guide. Because Fetron, Inc. is a fake company, I used my generic style guide.
- **Additional useful context, such as deadlines, achievements, etc.:** See the following sections.
- **Changes after publication and why:** No changes occurred after publication.

My Process

I had been performing research on management practices and concepts for a future project. Because a lot of work (research) needed for a report had been done, it only made sense to make the effort work for me in multiple ways. I decided to create a report using the information I read during my research. To create the context for the report, I created two fake companies: one providing the consultation and the other receiving the consultation. The fake project consisted of Ixus, Inc. providing management consulting services to Fetron, Inc. with an objective of helping Fetron, Inc. create a better environment to retain and attract new employees.

Fake Scenario: To determine focus areas, consultants conducted research by interviewing employees, reviewing websites where employees submitted reviews (like Glassdoor and

Indeed), and acquiring employee feedback. After analyzing the research results, Ixus met with upper management that initiated the project and presented the results (PowerPoint presentation with visuals and general information). From all resources used and conversations with Ixus consultants, I created the report.

To ensure that the report was easy to read and scannable, I created a template that enhanced readability. Because the report is an Ixus project file, the Ixus file naming and numbering procedure in my portfolio applied. Therefore, a space for the document number was part of the template.

Ixus consultants involved in the project reviewed the report content, provided revisions as needed, reviewed the report again after any revisions, and approved the report for delivery. Documentum is the content and version control management system used at Ixus, so the review and approval process was initiated and completed through Documentum.

How I Went Above and Beyond

Because of the quality of work that I believe in delivering, I went beyond what was required in the following ways:

- created an aesthetically-pleasing template for the report that enhanced readability.
- included content controls in the template where information is automatically added into the document when typed once, decreasing time spent typing the same information in multiple places, increasing productivity, and decreasing opportunity for human error. The only requirement is that the document creator types in the correct information in the one location.
- tied the report to a fake company that I created for an internal procedure:
 - same branding colors for the template and logo
 - used the document number and filename guidance for assigning the document number and filename.
- included document control elements: revision history page, headers and footers that help with recognizing differences in copies even when pages are printed and separated from the entire document.
- used the same footer format and similar document structure as the Ixus internal document numbering and filename procedure but not the same template because the document is a different document type (report versus procedure).

Innovative Management Consulting

Report

Client: Fetron, Inc.

1869-REP1 | Revision 1 | Final
September 3, 2023

IXUS



Photo by Rohan Makhecha on Unsplash

Document Control

Project Title	Innovative Management Consulting
Document Type	Report
Client	Fetron, Inc.
Client Contact	Mary Smith
Ixus Project No.	11048
Project Lead	Ashley Doe
Ixus Document No.	1869-REP1
Revision Number	1
Revision Status	Final

Revision History

Rev	Description
0	Final report submitted to client.
1	Added sub-topics to sections to make report easier to scan.

Table of Contents

1.	Introduction	1
1.1	Project Description	1
2.	Method	2
3.	Results and Discussion	3
4.	Recommendations	3
4.1	Becoming Employee-Focused	4
4.1.1	New Role: Employee Engagement Manager	4
4.1.2	Employees Evaluating Managers	4
4.1.3	Required Management Training	4
4.1.4	Employee First	5
4.1.5	Make the Employee's Day	5
4.1.6	Give Employees a Say	6
4.1.7	Pay People to Quit	6
4.1.8	Good Job Awards	7
4.2	Benefits	7
4.2.1	Flexibility	8
4.2.2	401K	8
4.2.3	Paid Time Off	8
4.2.4	Health Insurance	9
4.2.5	Discounts	9
4.2.6	Bonuses	9
4.2.7	Hire a Dream Manager	9
4.2.8	Avoid Past Salary Questions	10
5.	Management Directives	10
5.1	Refrain from Micromanagement	10
5.2	Do Not Test People for Hire	10
6.	References	11

Appendices

No table of contents entries found.

1. Introduction

Ixus Inc. is a consulting firm that provides consulting services in management, engineering, writing/editing, marketing, and sales. The firm consists of experts in these industries with 10 or more years of work experience in addition to their post-graduate education. With a notable reputation as a world-class consulting firm, Ixus was tasked with providing management consulting services to Fetron, Inc. Fetron is a leader in design software development and desires to be a leader in innovative company practices to retain and attract quality resources. Since upper and lower management control company practices, the innovation must start with management decisions and practices.

Ixus will be used in this report to indicate any representative from Ixus, Inc. **Fetron** will be used to indicate any representative from Fetron, Inc. The focus is on using the company names versus individuals to distinguish the client from the service provider.

1.1 Project Description

Ixus received a request for management consulting services from Fetron, a project that would be completed within two months. This report is the last milestone in the project, which includes recommendations that would help retain employees, decrease turnover, and recruit new employees. Another outcome Fetron desires is more positive reviews on websites that publish current and former employee reviews. Even though the company's rating is not low (3.9), Fetron would love a 4.3 rating or above.

After conducting a thorough investigation and analysis of the following, Ixus developed an effective plan for improving the management/employee relationship:

- employees' desires, dislikes, and suggested improvements
- managers' desires, dislikes, and suggested improvements
- company's needs

After reviewing the research data, Ixus provided recommendations with high probability of the following:

- improving the company's reputation and reviews
- retaining quality employees
- recruiting quality new hires
- increasing employee satisfaction

2. Method

Based on what Fetron wanted to achieve, Ixus developed a plan for obtaining information to provide recommendations. Because consultants could access online company reviews anytime and anywhere, it was easier to start with reading and analyzing reviews. Ixus consultants visited various sites where current and former Fetron employees submit company reviews (Glassdoor, Indeed, Vault, Careerbliss, Kunnunu, etc.) and noted positive and negative feedback from the sites.

2.1 Surveys

The next easiest goal was obtaining information through a survey because this was another method that did not require setting aside time to meet with people. Fetron required employees to complete the survey, but responses were anonymous. Survey responses would reveal what employees loved most and least about the company and ideas they felt would improve their views of the company. Employees received an email from Ixus that contained a link to an outside website to anonymously provide feedback. Even though Ixus was an external vendor and this provided comfort for employees to be completely honest, Ixus wanted the employees to feel true anonymity. Therefore, Ixus redirected Fetron's employees to a site not linked to Fetron to complete the survey at work or home. Ixus received data on if an employee who clicked on the link completed the survey but could not tie specific responses to specific employees. Connecting responses to employees was not a need or important enough for Ixus to spend time on it. Consultants obtained qualitative and quantitative data from the survey.

2.2 Communication Evaluation

In addition to a survey, Ixus consultants reviewed emails (communication). Consultants requested five (5) separate email chains from each employee between the employee and a co-worker and five (5) email chains between that employee and his/her manager. To get an idea of how needs and wants were communicated and addressed, the emails had to be emails where needs or wants were communicated, preferably emails with varying outcomes. An example were email chains resulting in co-workers and managers meeting and not meeting the needs.

2.3 Focus Groups

Obtaining data via focus groups was another method used. The consultants facilitated focus groups with only managers and separate focus groups with individual contributors. These were safe spaces where employees could freely vocalize frustrations and positives orally. This presented a space where employees would likely express more because of the ease that comes with speaking thoughts versus filling out a form and not having that personable experience. Ixus consultants did not know or collect names or positions. Attendees could choose a date and time within a certain time slot to meet with the consultants.

3. Results and Discussion

After collecting the needed information, Ixus was able to provide ideas to help Fetron become a leader in innovative management. The results revealed the following:

- Antiquated management practices are not the way to attract modern employees who seek flexibility and hate micro-management and clock watchers.
- Modern employees desire managers who are only concerned about the work getting done and trusts employees.
- Even though older employees sometimes take on more work when they no longer have children at home, they still desire a decent level of work/life balance and good benefits (especially health benefits).

A study by Brown and Lam showed that managers play a vital role in employee satisfaction and company profits. Frontline employees perform better when they feel supported and satisfied in their work. It is important for managers to understand that their role is to support employee satisfaction and therefore customer satisfaction because managers' success in this role impacts the company's financial performance (Burkus, 2016).

Employees typically want the following:

- to feel appreciated, trusted, and cared about
- an adequate work/life balance
- support and professionalism from managers

These were common issues discovered through surveys and online company reviews. Many sub-categories exist within these general concepts.

Because people spend eight hours a day at work, something that they do for a large majority of their day, work should be enjoyable and energize them (Lundin et al., 2000). One way to energize people and make something enjoyable is to involve these people in the decision-making process and brainstorming ideas on things that affect them.

4. Recommendations

For Fetron to become a leader in innovative management practices, Fetron must become a forward-thinking company. Retiring antiquated practices that are not helping the company grow and would not hurt the company to retire is a start. Adding modern practices and some less widely known practices is also vital. Based on the feedback received, Ixus feels that incorporating the following methods would help Fetron reach its innovative management goals.

4.1 Becoming Employee-Focused

4.1.1 New Role: Employee Engagement Manager

Create a new role at Fetron: Employee Engagement Manager (EEM). The EEM will guide all managers in employee management to foster good relationships between employees and managers. This person should have post-graduate education in management with a concentration in managing people and be a proven innovator with experience in customer service. It is good if this person has managed others successfully but not necessarily. This person could not have held a management role previously but can know what it takes to successfully manage people (experience could have been in consulting or guidance before). It would also be good if the EEM has some knowledge in human resources but not necessary since there is a human resources department that the EEM can contact for guidance and information.

The EEM would hold managers accountable to completing goals developed after employees review managers (see section 4.1.2). This person would also brainstorm and implement ideas that would help the company obtain and retain quality employees. An EEM is very beneficial to companies infamous in promoting people to management who have been with the company a long time, kiss up or buddy up to influential people, or good at their particular specialties but have no experience or knowledge in managing people.

4.1.2 Employees Evaluating Managers

Implement employees anonymously providing yearly evaluations about their managers. Managers should not be only evaluating employees but should be held accountable for how they manage since managers play a big role in employees' satisfaction at work. This is not to be used to fire managers but make better managers. Based on the reviews, the Employee Engagement Manager should compile an employee feedback report for each manager that summarizes common positives and negatives. Based on the employees' feedback, the managers should develop improvement plans for themselves. The plan should have three improvement goals and plans of action for the year to achieve those goals. These goals should be communicated to the managers' teams so employees can easily recognize the changes and provide feedback at the end of the year. After the goals have been achieved, the managers should observe and note any changes in the employee/management relationship that may have stemmed from the management improvements into his/her improvement plan. The EEM will add the goals to each manager's employee feedback report and add the manager's improvement plan as an appendix.

4.1.3 Required Management Training

Like how teachers must acquire training to keep their certifications valid, require managers to acquire so many management training hours. Require managers without management degrees to acquire more training hours than those with management degrees every year. Fetron should

fully pay for this training, which could be allocated within salary or other ways. This yearly frequency reminds managers how seriously Fetron is taking management quality.

4.1.4 Employee First

Adopt the employee first method versus customer first. Yes, customers are important and without them, there would be no business. However, employees are just as valuable if not more than the customers. Obtaining customers is great, but if there are no employees that can provide the services that the customers need, there may as well be no customers. The goal of the employee first method is getting better productivity from employees when they are viewed as more valuable than customers, focusing less on competing for customers in the short term and more on serving employees to win in the long term. Therefore, customers would receive better customer service from more productive and satisfied employees, resulting in business growth or profitability. This strategy involves management, even the CEO, and other support personnel supporting front-line employees, not managers commanding and controlling them (Burkus, 2016, p. 26).

A CEO of HCL Technologies in India, Vineet Nayar, implemented a support ticket strategy between management and individual contributors, much like what is done when an employee needs computer assistance from the IT department in a company. The purpose was to create a clear message of who was accountable to whom (Burkus, 2016, p. 30). The support ticket strategy is good for Fetron. The strategy could involve the following:

- If the issue is a new issue, the ticket is assigned to the direct manager.
- After the issue was assigned to the direct manager and nothing changed or the employee did not get satisfactory communication from the direct manager, the ticket is assigned to the next manager in the chain of command.

This chain of command process would continue until a satisfactory compromise or solution occurred. The tickets will serve as proof communicated issues, inactions, and actions to resolve the issues.

4.1.5 Make the Employee's Day

Managers should send an email to each of their employees every two months, stating what the manager appreciates about the employee. This is the concept of making their day. Instead of "making the customer's day" (which is always the case and goal), this is "making the employee's day" (Lundin, Paul, and Christensen, 2000, p. 66) See the following example:

Example: I love how you take the initiative to send me updates without me asking for them.

Taking time to appreciate employees will help employees feel appreciated and possibly soften any blows from complaints or improvements that managers communicate in performance

reviews. The performance review will include all the things that the manager sent throughout the year in the emails but will also include improvements. This will ensure that employees feel motivated and appreciated throughout the year versus just getting feedback at the end of the year. These positive emails can also serve as proof of an employee's workstyle along with performance reviews when trying to obtain future employment at other companies. Granted that companies hope to maintain employees, this does not always happen because of layoffs or the company or employee feeling that the time has come to separate. This is especially important in times of required layoffs that can sometimes leave employees feeling unappreciated. The employee can hopefully move on without feeling some form of inadequacy and feel confident when seeking new employment. A person should walk away from Fetron feeling like they received some benefits that they can take with them beyond skills obtained and pay for time and skills. This is part of the employee first method.

4.1.6 Give Employees a Say

Give employees a say in how the company operates. Involve employees in positive changes by giving them an opportunity to submit innovative ideas through an innovation initiative. These innovative ideas could involve helping co-workers work better together, helping the company provide better services to customers, or promoting respect of job roles among colleagues. The latter would help people remain humble even when promotions occur that could cause people to forget humble beginnings. Because people spend 8 hours or more at work, something that employees spend so much time doing should be enjoyable and energize them (Lundin, Paul, and Christensen, 2000, p.36-37).

4.1.7 Pay People to Quit

4.1.7.1 Benefits of Paying People to Quit

Companies like Zappos (now owned by Amazon) and Riot Games have paid people to quit by making a cash offer to employees to quit. It was a way to gauge who was serious about working for the company or who was just chasing money. It also helped companies in the long run by preventing them from investing money in someone who was going to quit later anyway. Getting rid of people not really interested in working for the company eliminates the unengaged employees who end up hurting the company in the long run by not giving the quality work needed for profits. Companies avoid spending even more money on employees who would not be beneficial to the company in the long run. Constantly recruiting, hiring, and training new people costs companies valuable money. For the employees who would not take the money, the method increased engagement because it would psychologically make employees believe they must really love the company since they did not take the money. Therefore, this belief would manifest in their work.

4.1.7.2 Examples of Companies Paying People to Quit

Zappos' presented an offer of \$4K after the new hire's 4-weeks training period. Amazon adopted the offer when they bought Zappos but increased it and made it a yearly instance and only available to fulfillment center employees. It started out as \$2000 and increased yearly up to \$5000 and remained \$5K for every year after. It caused employees to re-evaluate their engagement yearly and resulted in renewed engagement for those who remained. The Zappos employees worked at call centers and Amazon only offered it at order-filling centers, which were places with high turn-over rates (people constantly quitting). This caused them to have a low turn-over rate than most companies in those areas of work. So, the offer helped the company even though many may see it as a crazy idea (p. 58-68).

Following Zappos, Riot Games offered up to \$25K for new employees (10% of their annual salary up to \$25K) if they quit within the first 60 days, even if they quit on the very first day. Riot Games employees were highly paid software engineers with salaries that could quickly get into six figures. The spirit of why was the same as Zappos; Riot Games leaders felt it was best to pay 10% now to an employee to leave as a bargain compared to the low performance and poor fit that the company would be getting for a year or more. That person would be doing himself/herself and Riot Games a disservice to remain just for a paycheck. Riot Games hoped it was an offer that employees would reject just like Zappos/Amazon. They did not want to actively push people out but wanted to provide a safe and clear exit path (Burkins, 2016, p. 69).

4.1.7.3 Suggestion for Fetron

Fetron could pay people to quit to ensure that it hires and maintain quality employees. Fetron can decide what amount is feasible. Some companies enact stringent hiring practices to ensure that whoever is offered the job really wants the job because of the hoops that person jumped through to be there. However, some quality people feel like they have jumped through enough hoops to get where they are by completing many years of education, paying thousands of dollars for that education, and working in companies that may not have been the best experiences to grow and get experience. Stringent hiring practices can be a turn-off versus the "pay people to quit" method.

4.1.8 Good Job Awards

Provide incentives to employees to do good work and award employees for doing good work. These awards or incentives can occur in many ways, such as award nights with trophies, certificates, gift cards, or whatever award method the company would like to implement. This is a great opportunity to innovate or be creative.

4.2 Benefits

Provide better benefits that show employees that the company cares about them but benefits

that would also benefit the company in ways beyond just retaining quality employees. The following benefits help with attracting new employees and retaining existing employees.

4.2.1 Flexibility

Time clocks should be a practice of the past. Time should not be monitored strictly because it is not about the time spent on work. It is about people completing quality work. This also takes the pressure off employees when trying to get to work in a huge city with common traffic issues that can cause people to be late and other things that can occur out of an employee's control. This is easier to do if Fetron's clients offer different work shifts and flexible hours to their employees.

Offer flexible work hours to help with work/life balance. Also, allow employees who can work from home and would like to work from home to do so if they can complete work on time. If they do not, this benefit can be taken away if needed. Many studies have shown that remote work can increase productivity and lower employee turnover.

4.2.2 401K

Immediately vest employees for 401k. Any matches that the company provide should immediately belong to employees from the hire date and forward.

4.2.3 Paid Time Off

Provide unlimited PTO, which will include any days needed for being sick. If the company will trust employees to complete work on time, they should be trusted regarding requesting vacation time responsibly (for example, not doing so at a very busy time of the year and there being a good reason if they do during that time). This should not be a ploy to prevent the company from having to pay unused PTO to employees when they are no longer working for the company for whatever reason. Promoting employees to take time off should be occur in every employee meeting. Managers, lower and upper management, should take PTO for a few days every month. Leadership should make their requested PTO known to employees so that employees can see/know they are doing it and feel comfortable with taking time off because they see it is not a trick.

Managers should ensure that appropriate coverage is available to complete work. If work completion is not lacking, employee time off requests should be approved with no issues. Honesty is key when time off cannot be approved. With disapproval managers should inform employees why, state that they would like to revisit taking time off soon, and follow-up after project completion as stated.

Articles and books have been written regarding unlimited vacation time and how employees still treat the time as if they have set PTO hours because there is a fear of it being taken away if companies feel that the unlimited time off will be abused. Another benefit of an unlimited

vacation policy is that such policies sometimes build high-performance culture. Employees and managers feel a need to remain high-quality because of the freedom in these policies (Burkus, 2016, p. 49)

This is something meant to benefit the employees, not take away from them; therefore, when switching to unlimited PTO, this should start at the beginning of the year. For existing employees under a past PTO system, any unpaid PTO should be paid to employees at the end of the year and everyone put on unlimited PTO when the new year starts. Another way to incorporate this is to switch to a use or lose policy the next year and incorporate the unlimited PTO policy the year after the use or lose policy year. It is important for Fetron to see that unlimited vacation is not about days off but about trust (Burkus, 2016, p. 57)

4.2.4 Health Insurance

Provide good health insurance plans that are not expensive with HSA and FSA options. Research into what other companies are offering that their employees are happy with is a good place to start. This helps with knowing what to offer to be competitive when attracting talent. The plan should be feasible for the company but also beneficial for employees.

4.2.5 Discounts

Offer discounts for computers, cell phone plans, gym memberships, rental cars, discounts from retail stores, and other fringe benefits.

4.2.6 Bonuses

Offer annual bonuses when the company reaches revenue goals or offer yearly Christmas bonuses to everyone employed at the company. This will help tremendously with Christmas shopping and travel. Bonuses should be provided to everyone in the company because anyone without good performance reviews should already be dismissed from the company or on improvement plans with noted improvement.

4.2.7 Hire a Dream Manager

Hire someone who is 100% dedicated to helping employees achieve financial, career, and personal goals. This person would be the company's literal manifestation of care for employees. In Matthew Kelly's book, *The Dream Manager*, the role is called Dream Manager. However, Fetron can come up with another title that fits the role. The "dream" manager's job should be to reach out to all employees, determine what financial, career, and personal goals they want to achieve and help employees create a plan and achieve that plan. This is a cycle that can continue with each employee, starting with one goal and attacking the next goal after the first goal is achieved.

4.2.8 Avoid Past Salary Questions

Do not ask new hires about their past salaries. This is personal information that is irrelevant to the experiences and skills that a person is bringing to your company. The person is coming with more years of experiences than at past jobs. Also, any unfair pay provided to the person before will likely have a lot to do with why the person seeks new employment, even though the person will likely not make that known. People should be paid based on the role under discussion: the skills and experience they are bringing to the role and amount of work required by Fetron. The discussion is about Fetron, not their past employers.

5. Management Directives

This section contains directives for managers with individual contributors (ICs) reporting to them.

5.1 Refrain from Micromanagement

Do not check in on the IC constantly. Trust them to do the work you hired them to do. The company hired the person because those involved in the hiring process felt that the candidate would be the right fit. Allow that person to show this naturally versus influencing the employee through check-ins. The inconstant check-ins help employees feel trusted and allow managers to concentrate on tasks they must do, especially if a manager is a working manager.

Establish a meeting time that will occur every two weeks for the first 3 months. After the 3 months, the manager should set up a monthly meeting day where the manager discusses what the IC has accomplished, any assistance needed that hasn't been voiced in emails as immediate needs, and any issues for which the manager can help facilitate resolution. Managers should also use this time to relate to the ICs by telling them about some similar struggles they have had or are presently experiencing. This gives a feeling that the manager and the ICs are in this together and not cause IC to feel judged for any expressed frustrations, that the manager is one with ICs and not above them.

5.2 Do Not Test People for Hire

Do not test candidates who obviously know what they are doing when you see they have a degree in an area, especially those with an M.A., Ph.D., or other professional degree. This is especially important to do not do when they likely know more about it than you or anyone you have ever had in the role before or if you have never had someone in the role before. This practice is even worst when your testing method is not even up to par or error-proof and when you may not have someone qualifiable enough to determine if the candidate is incorrect.

If you would like the candidate to get an ideal for what he/she will be doing, do this by giving them an exercise to experience the work but not to test them. It is so much that goes into daily tasks and so many factors that could play a role in decisions made at any given moment that a

mere test won't give employers a good sense of how that person will perform when the time comes.

6. References

Fish! A Remarkable Way to Boost Morale and Improve Results. Stephen C. Lundin, Ph.D., Harry Paul, and John Christensen. Hyperion, New York, New York. First Edition, 2000.

Burkus, David. *Under New Management: How Leading Organizations are Upending Business as Usual*. Houghton Mifflin Harcourt, Boston, 2016.

The Dream Manager. Matthew Kelly. Hyperion, New York, New York. 2007.