

[Martius Vicente Rodriguez y Rodriguez]

BUSINESS MANAGEMENT

Behind the Scenes

Stories that make you think
about how to obtain gains from
your everyday experience

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Business Management: behind the scenes

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Author

Martius Vicente Rodriguez y Rodriguez

Collaboration and Translation

Érika Freitas Costa Gomes

Editorial design, cover, illustrations and layout

Marina Vasconcelos Maluf de Barros

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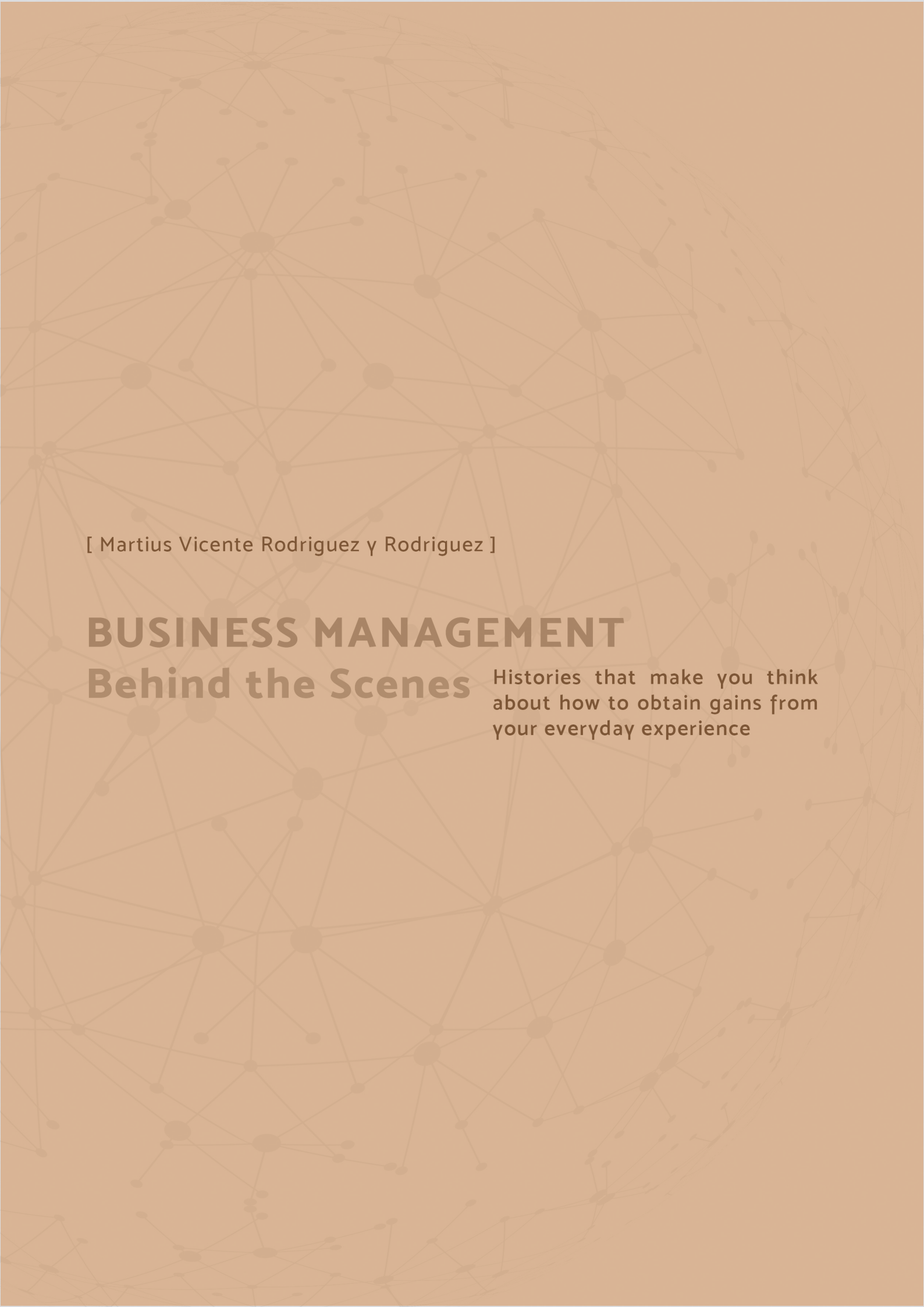
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A close-up photograph of a dark-colored ceramic coffee cup filled with a hot beverage, with wisps of white steam rising from the top. The cup is placed on a thick, textured, light-brown knitted blanket or rug. The background is softly blurred, showing more of the textured surface and a hint of a wooden surface.

PREFACE

After writing and contributing as an author to more than sixty books about business management, I realized that a significant gap exists between the theories taught in books at universities and schools and the actual practices of organizations.

This gap has been bridged in classrooms when some professors illustrate, drawing from their own experience, the meaning of concepts and ideas related to management practice.

A challenge has been brewing in my mind for many years. It relates to the available literature that attempts, in a playful way, to convey practices that are often only learned through trial and error, even when professionals have the opportunity to learn from a senior willing to pass on their knowledge.

In this way, the assimilated knowledge is transferred and verified. However, real world jobs are based on developed skills. That is, daily practice is incorporated during the challenges professionals must solve. These professionals will be able to learn and be great professionals depending on the environment and challenges to which they are submitted.

As you can see, this work aims to share real stories experienced by the author and some identified collaborators, with the goal of helping professionals shorten their learning curve through easy and understandable reading. Have a good reading and learning.

Rodriguez y Rodriguez, Martius Vicente
martiusrodriguez@id.uff.br



SUMMARY

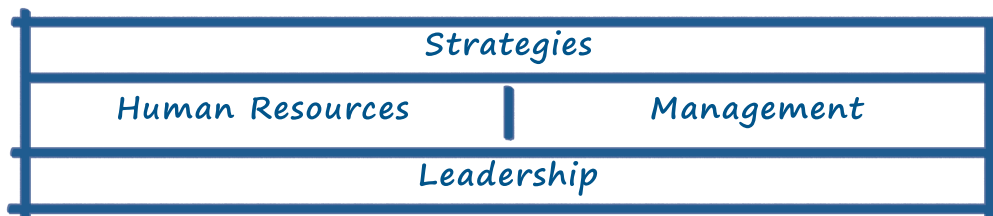
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INTRODUCTION

From more than a hundred situations experienced in organizations, the author sought to identify some situations, each related to one of the four major areas necessary for the proper functioning of company management.

These areas are presented in Figure 1. The first one leadership, can be identified as the basis of an organization since from its leadership, it will be possible to lead the company in a proper direction to achieve the vision designed as a dream determined by the company leadership.

Figure 1: Structured Elements in Chapters



Source: author, 2003

The second one, which is management, refers to the definition of processes, infrastructure, and all the technology needed for the operation of the organization. It represents all the tangible values and explicit knowledge that exist within the company. This block management is illustrated using some real cases, and lessons learned related to this.

The third one is Human Resources, which represents all the collaborators and tacit knowledge retained in the organization, as well as the potential it can have in the future. This section Human Resources is also illustrated using real cases and lessons learned related to it.

The fourth and final section Strategies represents the direction and how organizational objectives will be achieved. This section, Strategies, is similarly illustrated based on real cases typically encountered by the CEO (Chief Executive Officer) and managers during their professional lives.

Thus, the illustrated cases, extracted from over 40 years of professional experience, are constructed based on the model presented in Figure 1. The objective is to demonstrate, through real cases, the lessons learned that the business world offers us daily. Each moment is unique. However, in all the cases presented, it is observed that the lessons learned were rooted in management theory, forging a connection between theory and practice.

While some cases may seem humorous and surreal, they represent the behind the scenes stories that managers encounter daily. These stories resonate with all of us who work in business management, as we often find ourselves in situations that, if recounted, might seem unbelievable. Nevertheless, they occur and provide us with valuable learning experiences.

Below, you will find some structured stories based on the model depicted in Figure 1. We hope that each reader can enjoy them. After reading, you can share your experiences with us via our email contact if you wish. It would be a pleasure to learn about your unique experiences, which always bring valuable insights into our lives, especially in the realm of management.

1

LEADERSHIP
[cases]



CHAPTER 1

1. Leadership Preparation

Changing from administrative to technical for better management

At one point, Vincent worked as a technician in the computer graphics field and later transitioned into engineering. In the same department, there was also a manager responsible for overseeing the entire corporate technology area, which involved managing seven data processing centers located in different state capitals across Brazil. The corporate manager's primary responsibility was the administrative management of significant contracts with technology companies. These contracts aimed to distribute processing capabilities at the local level within each state, rather than centralizing them solely at the company's headquarters office.

Vincent, who worked in the computer graphics area of engineering, was assigned to take on a more bureaucratic and administrative role in the corporate computer area.

Upon taking charge of the corporate computer department, Vincent noticed that the existing team primarily handled administrative functions and contracts, while the actual execution of technical tasks was outsourced to other companies.

Vincent encountered a challenge based on the following practical question: Is it possible for someone to supervise technology services, functions, and contracts without understanding the technology? In other words, can you manage an area without having the necessary technical knowledge? One thing that caught Vincent's attention, as he shifted towards more technical management, was that service budgets appeared substantial, and seemingly minor problems became complex when budgeted.

Leadership Cases

One day, a user requested the addition of a query screen to a certain material database that had not been initially planned. When the request was made, the company that typically handled this work estimated that it would take approximately thirty days and the budget would be equivalent to US\$100,000.00. Vincent was astonished by the high cost and time required for the service. He invited Mary, a computer analyst who worked with his team, to take on the challenge of resolving the matter together. Mary, who possessed a good understanding of the database, assessed the demand and confidently stated:

“Vincent, if you give me four hours, I will solve this.”

“Mary, how is it possible for you to resolve this matter so quickly? I’ll give you this time to prove it to me!” Vincent exclaimed.

Vincent, intrigued by Mary’s quick response, agreed to give her the opportunity to prove herself. After four hours, under Vincent’s supervision, Mary completed the new query interface requested by the material database client. Vincent, who had come to appreciate the significance of technical knowledge, called a team meeting and announced:

“Dear employees, we are going to revolutionize our management approach to achieve better results. This means that everyone should have an understanding of the technical solutions to be delivered and will have a say in guiding the services to be contracted. Those who rise to the challenge will be responsible for technically coordinating the development teams,” Vincent announced.

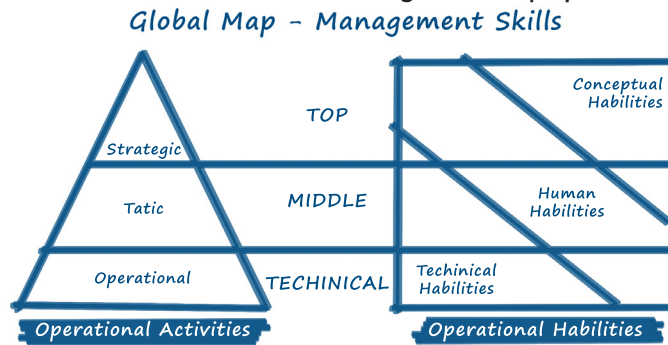
As Vincent informed the team, technical experts would oversee teams working on technical solutions, while administrative experts would oversee teams handling administrative solutions. Some employees found these changes highly rewarding and embraced them wholeheartedly, while others felt skeptical about the shift in emphasis from administrative to technical expertise. The end result was a more engaged team, as employees now actively contributed to the achievements.

Considering Figure 2, it is important to understand that:

Top Management: deals with uncertainties. They typically have access to a wealth of information and must be well-versed in conceptual management and business models, with a strong focus on human resource management. They need to understand how technology works and its relevance to the business. Their role involves transforming uncertainties into certainties at lower levels.

Middle Management: bridges the gap between the strategic and operational world. They must be capable of translating strategic plans and

Figure 2: Activities Distribution According to Activity Operation Levels¹



Source: author, 2003

directives into operational actions. Proficiency in human resources management is especially crucial at this level. They need to have a deeper understanding of technology and strategic models. In terms of technology, they should possess technical speech and know the terms and functions of technology. Regarding strategic models, they need to know how to implement these models rather than create them.

Operational Level: primarily focuses on day-to-day tasks. It requires the practical application of new technology. Profound knowledge of technology and the tools needed for developing and building applications in operational mode is essential.

< Lesson Learned >

A manager must, above all, have a comprehensive understanding of the activities within their area of responsibility and identify individuals with the appropriate skills for each area. Operational activities demand skills to execute tasks efficiently, tactical activities require the ability to analyze data and convert strategies into actionable plans, and the capacity to communicate these to the operational level. Finally, strategic activities necessitate proficiency in dealing with conceptual models and managing a wide range of information.

- 1 Skills and Activity: Aligned
- 2 Less work time
- 3 Less costs
- 4 More profit

¹ RODRIGUEZ, Martius Vicente, *Gestão do Conhecimento e Inovação nas Empresas*, Editora Qualitymark, Rio de Janeiro, 2011.



CHAPTER 2

2. Leadership Skills

Is leadership just about knowing?

This short story takes place in 1986 when we encountered a very interesting individual. He was highly intelligent and capable of solving extremely complex mathematical problems. However, when it came to dealing with other people, meaninglessness prevailed.

Thus, several stories consider this person, named Pag, symbolically as someone out of touch with reality but with a high level of intelligence. How is this possible? Well, let's try to explain this story:

Leadership Cases

One day, during a workday, a colleague of Pag named Richard began to talk to Pag, who had completed his doctorate in a very complex quantitative method, and suggested to Pag that he should now be the head of the department where they worked. After all, Pag had just obtained the title of Doctor. Naturally, he should become the new boss of that department. Innocently, Pag agreed with Richard and asked him:

'Richard, I agree that I should now be the new boss in this department,' Pag said enthusiastically with the idea. 'But how can I become the head of this department?'

'It's simple, Pag. First, you need to understand what each of these areas is working on,' Richard said. 'If you figure that out, you will have control over all our activities, and you can become the boss,' Richard concluded.

“Oh, Richard, it seems very simple, especially to me, who completed my doctorate in a complex area involving earthquakes in remote regions,” Pag responded.

“Good, Pag. I think the same way.” – Richard replied.

“How can I become aware of the work of each person in this department?”, Pag asked.

“That’s easy, Pag. You only need to ask each one what they are doing. After that, each one will tell you about the development of their activities, and you will have a complete understanding of this department. Then you will be able to be the boss of everyone here,” Richard answered.

With this mission, Pag started going to the workplaces where people were working, asking what they were doing. The first responded evasively without much understanding of why Pag had questioned him - probably imagining that it was a research.

Pag continued the marathon of questions by asking people and came up with one of them who was working as a trainee engineer and responded forcefully:

“Dear Pag, I didn’t quite understand your question. What’s the reason behind it?”

Feeling disheartened, Pag abandoned his quest and returned to his colleague Richard, admitting that the strategy had failed because people were reluctant to openly discuss their roles. Some, like the intern, questioned the purpose of these inquiries, which Pag couldn’t reveal because it might be seen as an attempt to undermine the current leadership—a role he didn’t hold.

This approach had not served Pag’s goal of becoming the new chief. He had innocently been drawn into a situation by his friend, which did not yield the desired results.

In this story, we can see that knowledge alone does not generate the possibility of becoming a leader. But it is a mix between knowledge, skill, attitude, and an individual’s socialization ability.

In detail, Pag did not realize that. To understand, it is present in Figure 2, where there are four characteristics need to be developed for achieving leadership:

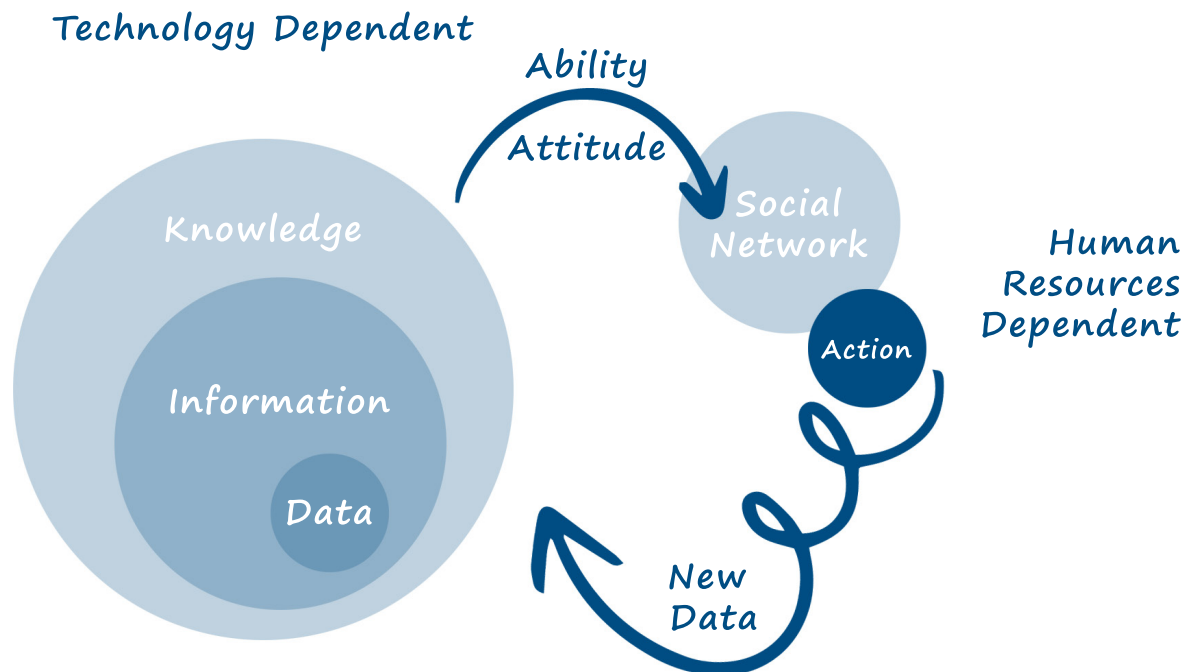
Knowledge: Ability to relate sets of information and thereby accumulate rules that represent knowledge - usually found in books and structured ways of accessing data and information. Remember: data are records without contextualization. Information is contextualized data, and knowledge represents the correlation between the information and the data. Example: Number 10 is data (given); John took note 10 is information; If John took note 10, then he is approved - it’s knowledge.

Ability: Ability is a combination of innate talent and the experience or practice a person gains over time. It pertains to one's capacity to perform specific tasks or skills. For example, riding a bike or writing a book requires both talent and practice to develop the ability to do so.

Attitude: This aspect relates to how a person approaches and executes their actions. It encompasses whether an action is undertaken with pleasure, enthusiasm, or stress, and it reflects the person's demeanor in carrying out their tasks.

Socialization Capacity: This refers to how an individual is perceived within their social network, particularly in terms of the friendship and trust placed in them by their peers. For example, a leader needs to earn the respect of their peers, and this respect is often built upon the foundation of friendship and trust. Therefore, even if someone is an expert in a specific area, it is of little value if their community or group does not believe in or respect them.

FIGURE 3- Data - knowledge transformation.



Considering the dimensions of data, information, and knowledge, it becomes evident that technology plays a crucial role in their organization. In other words, these three elements can be structured effectively using information technology.

However, when we consider the dimensions of knowledge, attitude, skill, and social network, it becomes clear that human resources management is essential. In this context, it depends on people and effective human resources management.

Therefore, it appears that the field of knowledge relies on both information technology and human resources. This multifunctional knowledge area depends on various dimensions.

Thus, in this situation, it is evident that merely possessing knowledge and knowing what people do does not make one capable of being a leader or even the head of a certain group. The balance between these elements will enable leadership to be attainable. Additionally, it is necessary to take into account that the environment is an important factor to consider.

This environment is represented by the social network in Figure 3.

< Lesson Learned >

Leadership depends not only on its technical skills but mainly on the combination of technical and social skills.

-  Technical skills
-  Plus social skill
-  More synergy
-  More profit



CHAPTER 3

3. Leading Leaders

Testing your leadership with other leaders

This case occurred in 1994 when Vincent worked as a manager in the change management department. The activity of change management had become a constant in companies, often requiring the unlearning of established practices to embrace new ones, thereby gaining valuable experience. Sometimes it was relatively straightforward, especially for those directly experiencing the changes.

During that period, the management model based on business units was introduced, necessitating the alignment of all executives responsible for each business unit with the goals of the holding company. To achieve this alignment, the company considered hiring an external consultancy to conduct a workshop. The chosen consultancy submitted a proposal that involved identifying strategic issues from the perspective of various executives, which would later be addressed during the workshop to ensure alignment. However, the proposed cost was quite high, leading to the rejection of external consultancy services. This decision had its downsides, as external consultants could have provided valuable insights and spared the organization from conducting the work internally.

This is when Vincent was tasked with leading this effort, alongside an experienced change management professional, Mrs. Ren. It was undeniably a challenge, given that all workshop participants held executive positions within each business unit. When examining the organizational chart, Vincent and Mrs. Ren found themselves positioned below these executives in the hierarchy, a situation that could potentially be contested by someone.

Leadership Cases

The challenge was accepted by Vincent and Mrs. Ren, and they were responsible for detailing the meeting and conducting interviews to identify strategic issues.

Then the workshop was designed using a dynamic approach that allowed them to outline actions for each business unit. The workshop planning was all set to be carried out, and they selected a team member to contribute.

This third team member, named Mr. Pin, was a senior professional who had worked in the company for a long time and was well-acquainted with each executive who would participate in the workshop. During one of their preparation meetings, Mr. Pin explained:

“I can bet that some executives will question the methodology adopted to invalidate the workshop or signal that they are hierarchical superiors and should be doing all the work. Some may even lack interest in certain actions,” said Mr. Pin.

“In that case, we must demonstrate that the methodology is appropriate,” said Vincent.

On the day of the workshop, everything was prepared, and Vincent, with Mrs. Ren’s support, began the work. In the first fifteen minutes, one executive challenged the methodology presented, saying, “I must say that I disagree with the methodology presented, and I believe it could be done differently.”

“I invite you to come up here and present the methodology you propose. If everyone here agrees with it, we will adopt it,” Vincent immediately replied.

Total silence followed. Vincent continued, “If we do not have a new proposal, we will proceed with what we have, as it was properly planned for this meeting.”

During the meeting, it was also noticed that some executives sought to delegate their unit’s problems upwards. One of them mentioned:

“This identified problem of an excessive number of people in the region should be elevated to a higher level to be solved,” said one of the executives.

“But, sir, the level that should decide on this is the business unit where you are the chief executive officer. In this case, there is no higher level to solve it,” said Vincent.

“That’s true. I hadn’t thought of that,” replied the executive.

The workshop was completed, but it was clear that there were often obstacles in the process leading to questions about why the change was necessary. Thus, in addition to being technically prepared, the change agent must also be emotionally prepared to fulfill the mission of being the driver of change.

Figure 4: Workshop Stages with CEOs to Define the Strategic Action Plan - To-Do List ⁴



Observing Figure 4, it is possible to identify three steps as follows:

Step 1: Diagnosis – This represents the preparation of all processes, in which executives were interviewed to identify the company’s current situation. The main problems and available resources were identified to address our lack of inputs needed to respond to strategic issues or problems that would directly impact the company’s results.

Step 2: Workshop – It begins with a summary of the diagnostics and the validation of the identified strategic problems. After that, each group will work to identify solutions to each situation. All groups must participate in resolving all identified strategic problems.

Step 3: To-Do List – After each group’s presentation, a summary should be made with the to-do list, required resources, and deadlines for completion.

< Lesson Learned >

Mapping the roles and responsibilities of each leader is fundamental because there should be no conflict of roles. Whenever there is any doubt, it is essential to revisit and clarify each leader’s role at each moment.

- 1 More focus
- 2 Less rework
- 3 Less wasted time
- 4 More profit

⁴ NORTON, David, KAPLAN, Robert, The Strategy-Focused Organization: How Balanced Scorecard Companies Thrive in the New Business Environment, Harvard Business Press, Boston, 2000.



CHAPTER 4

4. Leadership Careers Transition

Changing the turbine of a plane while it's flying is not an easy task!

Career planning is not simple because it requires preparation that must occur in parallel with your current activities. It's like changing the turbine of an airplane mid-flight. It involves a lot of energy and risks.

For Vincent, this transition was no different. In 1998, after a significant change in the company, where he played a central role in implementing this change, he realized that he, like any other employee, was just a number and an enrollment and that if he or any other employee didn't meet the expected targets, they could be out of a job and dependent on the company.

At that moment, in 1998, Vincent needed to contemplate a career transition, as he was still 15 years away from retirement, but it was time to start.

As a company manager, Vincent considered working in a different field, such as retail. To do so, he made an initial investment in a retail store and, for two years, sought to grow in this area. During that time, in order to juggle his responsibilities at the company where he worked and at the store, he had to give up many things, such as spending quality time with his family. Every night after his regular work shift, he went directly to the store, closed the cash register, and addressed any pending issues to be resolved the next day. He worked tirelessly.

Leadership Cases

After two years of juggling his job and his retail store, Vincent found himself on a business trip with his boss, Mr. German. During the flight, Vincent discussed his idea to expand further in the future. He was elaborating on his plans to achieve the magnitude he desired.

Vincent said to Mr. German, 'I currently own a retail store in a mall, and I plan to open a new store every two years, aiming for six to ten stores in the next ten years. With that, I believe I will have enough revenue to not worry about anything else.'

Mr. German listened thoughtfully and asked, 'Vincent, running a single store is already a lot of work. You go there every day and work hard, right?'

'Yes, it's a lot of work. I have to be at the store every day and put in a lot of effort,' Vincent replied.

'Now, imagine managing ten stores. What kind of life would you have? You'd probably be working all the time and have no time for anything else. What do you hope to gain from it?' Mr. German remarked.

'Wow, boss, you're right. I'd be working constantly and wouldn't even get to enjoy the rewards of running these stores,' replied Vincent.

'Exactly, and it doesn't seem like your profile to spend so much time on the demanding operations of multiple retail stores. It seems like you have a different objective in mind,' Mr. German pointed out.

That conversation during a business trip with Mr. German made Vincent rethink his plans. He had to revise his vision of the future and consider something that would fulfill him and allow him to live his life by doing things he truly enjoyed.

Vincent analyzed various alternatives for his career, including roles that would make use of his extensive managerial experience. Ultimately, he decided to pursue a career as a consultant and academic. The next step was to divest himself of the retail store and focus on his new vision for the future.

However, there had been a plan for Vincent to pursue an MBA, a program that was approved and supported by his boss, Mr. German. However, upon researching the requirements for an academic career, Vincent discovered that having a master's and doctorate degree was a primary condition.

Therefore, the investment in an MBA would not be adequate at that time, as this investment of time and resources would not contribute to the construction of this new Vincent's future vision. So, he talked to Mr. German:

“Dear boss. I’m going to need to change the MBA for a master’s degree because it would be more interesting for me since I intend to walk in the area of consulting and academic,” explained Vincent.

“Vincent, the company values the MBA program because it offers a valuable market perspective. I have completed this MBA program, and I believe it would be beneficial for you as well,” answered Mr. German.

That was a challenging situation for Vincent to resolve because Mr. German did not accept the exchange, citing that Human Resources had already defined it and could not make changes.

After approximately thirty days, Mr. German went on vacation, and guess who filled in for him? Vincent.

Vincent realized this would be the time to initiate the exchange, without causing major inconvenience to his boss, since he would be stepping in. And so, he did.

Immediately after filling in for Mr. German during his vacation, Vincent approached the Human Resources department and proposed the exchange. He justified it by explaining that the master’s degree program would be cost-free for the company, whereas the MBA would require an investment. The Human Resources manager was pleased not to have to allocate that amount of resources to the MBA and agreed to the exchange for the master’s degree.

Formalizing the exchange presented the most challenging task—informing his boss, Mr. German, upon his return from vacation, that the exchange had been arranged and had incurred a budget allocation.

The conversation was tough for Vincent, but in the end, Mr. German agreed, and everything proceeded smoothly. This marked the first step in Vincent’s career transition. Vincent realized that when you can identify a dream or a goal to pursue, everything becomes clearer in your mind. However, achieving that dream is not always easy, as numerous obstacles may arise along the way, attempting to divert you from your primary objective.

After completing his master’s degree in 1999, it was time for Vincent to pursue a doctorate. This presented another challenge since obtaining a doctorate required full dedication. To address this, Vincent identified a project aligned with the company’s priorities, ensuring that his doctoral research would align with the company’s objectives.

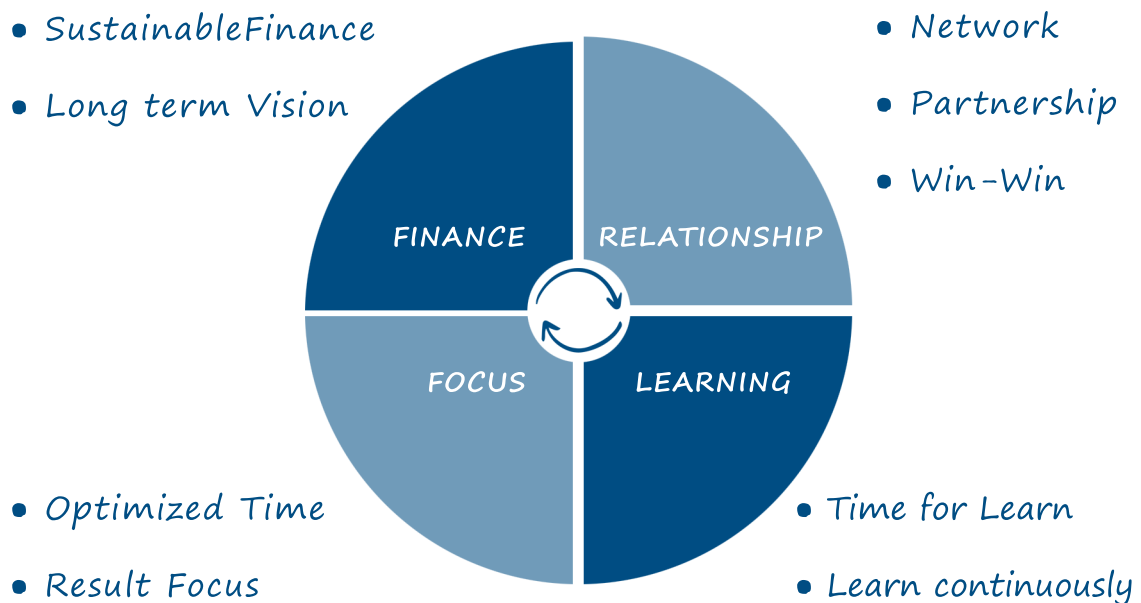
Another round of negotiations was necessary, and this time, Vincent leveraged his managerial position as a bargaining chip. He proposed relinquishing his managerial role to focus on his doctorate, emphasizing the company’s interest in his research. After several meetings with the company’s research director on the matter, Vincent secured approval for his

long-awaited doctorate. This marked another step toward realizing Vincent's vision for the future, even though it meant giving up his managerial position to immerse himself in research.

Gradually, Vincent built his vision for the future, with one of his objectives being not to rely solely on his company salary. This meant constructing a new career, which posed a significant challenge requiring an effort on par with his corporate responsibilities. Vincent gradually managed this transition and started generating additional income through consulting and teaching. The effort was worthwhile. Throughout this process of change and career construction, many of Vincent's colleagues approached him, saying, 'Vincent, how could you give up a managerial role and its accompanying bonuses to pursue further studies? It doesn't seem logical.'

Years later, these same individuals approached Vincent and admitted, 'Now we understand what you did. It was truly remarkable and visionary. At the time, we couldn't comprehend your decision.'

Figure 5: Dimensions for constructing the balanced scorecard⁵



Upon observing Figure 5, the following dimensions are described as follows:

Finance: This dimension represents the total amount of money available to sustain your lifestyle throughout your lifetime, which can be measured in days, months, or years. Understanding this information is crucial to balance the time spent on pleasure with the financial security needed for a lifetime. It's possible to observe:

⁵ ULRICH, Dave, *The Leadership Capital Index: Realizing the Market Value Leadership*, Berrett-Koeller Publishers Inc., Oakland - CA, 2019.

Sustainable Finance: Refers to the total time you can live comfortably based on your current financial resources.

Long-Term Vision: This refers to your long-term objectives for the next one, two, and three years, at a minimum.

Relationships: This dimension encompasses your connections with family, friends, and colleagues. Family relationships tend to be long-term, friendships fall into the medium-term category, and professional relationships with colleagues are typically short-term.

Network: Pertains to the size and maintenance of your professional network. A smaller network may suffice for long-term relationships, while a larger network can help maintain your image and create new opportunities.

Partnerships: Includes existing partnerships as well as potential collaborations.

Win-win: Reflects the number of mutually beneficial partnerships. Consider which relationships are worth nurturing and which may need to be reevaluated.

Focus: This dimension represents minimizing time lost on unimportant matters. Establish both long and short-term objectives and celebrate each accomplishment.

Optimized time: Organize your weekly schedule and identify where you may be losing time.

Time focus: Define time limits for each activity and acknowledge achievements when tasks are completed more efficiently.

Learning: Dedicate time to reading books, watching films, writing, reflecting, and engaging in conversations to enhance your learning. You are continually learning, even in situations you've experienced and think you understand.

Time for Learning: Allocate at least 30% of your time to learning.

Learn continuously: Strive to identify lessons learned in every situation to avoid wasting time and accumulate more knowledge.

< Lesson Learned >

Build spectacular dreams and engage in annual planning, measuring whether your goals have been achieved. Do not be afraid to start over because time is unique, and life is singular. Live each moment with intensity, looking toward the future. The future vision is the goal, but the daily process is real life.

-  Clear objectives
-  More focus
-  Less wasted time
-  More profit

2

MANAGEMENT
[cases]



CHAPTER 5

5. Management and focus

Clean table and focus

Leadership Cases

Once upon a time, there was a young professional who, after completing his graduation, began working in an organization where he was responsible for overseeing a team in charge of industrial construction facilities in the state of Bahia, specifically in the city of Catu.

In 1980, at the age of 22, Vincent was appointed as the head of a group responsible for industrial construction facilities. His role required him to supervise various industrial projects in the city of Catu, located in the interior of Bahia, Brazil.

One cultural aspect that caught Vincent's attention was the daily requirement for employees to sign in upon entering the administrative workspace. He noticed that his immediate boss conducted brief daily meetings at his desk, with only a single spreadsheet in front of him, leaving the rest of the table free.

It was a recurring practice for Vincent's immediate leadership to discuss daily activities by referring to the notes on this single sheet of paper, in the form of a spreadsheet. This sheet precisely indicated the percentage of completion for each work in progress and the priorities for the day.

This approach involved using a single worksheet that summarized the essential information for each ongoing project, including work descriptions,

the responsible company for execution, and the physical and financial completion percentages. The following day, the same routine would repeat, with Vincent reporting what had been accomplished and what needed to be done next.

The simplicity, clarity, and effectiveness of this method left a lasting impression on Vincent. In 1986, when he became the head of a new team focused on structural engineering projects, he decided to implement a similar system. This method allowed him to manage multiple projects using a single A3-sized sheet.

Even though Vincent was not familiar with all aspects of management practices at the time, this initiative enabled a results-oriented management style. Employees appreciated the clarity and the emphasis on achieving results.

Using the same method he had learned in 1980, Vincent employed a similar spreadsheet to manage his team's activities. During discussions with team members, he would assess the physical and financial status of each project, streamlining daily management, as illustrated in Figure 6.

Figure 6: Daily Checklist for projects or activities example⁶

	<input checked="" type="checkbox"/>
<i>Description of project or activity</i>	<input type="checkbox"/>
<i>Responsible</i>	<input type="checkbox"/>
<i>Budget</i>	<input type="checkbox"/>
<i>Cost incurred</i>	<input type="checkbox"/>
<i>Physical realization</i>	<input type="checkbox"/>
<i>Deadline</i>	<input type="checkbox"/>
<i>Date - Last update</i>	<input type="checkbox"/>

⁶ RODRIGUEZ, Martius Vincente, *Gestão do Conhecimento e Inovação nas Empresas*, Editora Qualitymark, Rio de Janeiro, 2011.

< Lesson Learned >

The institutionalization of a single source of consolidated information regarding the progress of projects in both physical and financial aspects is essential for maintaining a focus on results. To achieve this, a manager should have a concise overview, consolidated on a single A4 or A3 sheet, detailing their projects and goals, along with information about the physical and financial status of each activity. You can only effectively manage what you can measure and control.



Clean workplace



More focus



Less wasted time



More profit



CHAPTER 6

6. Management Performance

An analogy with a waiter serving coffee

Leadership Cases

Who hasn't enjoyed a good cup of coffee? Years later, Vincent found himself sipping coffee with his good friend, Walter. During their conversation, Walter skillfully drew parallels between people's performance and the way waiters serve coffee. He could translate the profile of some people regarding obtaining the results interestingly. He explained, "You see, Vincent, there are different types of people, and we can illustrate this using the example of coffee servers." Walter went on, "When we order a coffee, there's a waiter who promptly takes note of our order, and returns with a cup, coffee, sugar, sweetener, and a spoon. Everything is well-prepared, and you can enjoy your coffee just as you wanted it – this waiter is focused on delivering the expected result."

"But Walter, isn't that the standard?" asked Vincent. "It should be," replied Walter, "but there are cases where the waiter only brings the cup and coffee, missing some of the necessary items for a perfect coffee. In this case, the waiter is focused on specific activities or parts of the process, and they might not realize that something crucial is missing. Consequently, they don't achieve the expected result." "I see," said Vincent, "what other profiles are there?" Walter continued, "The worst profile is when the waiter doesn't even understand that the expected result is a ready-to-drink coffee. They keep coming back to the table, repeatedly asking what we need, but nothing happens. This is the most challenging case because the person fails to grasp our expectations."

Vincent appreciated the analogy as it aptly identified different professional behaviors and whether they were focused on delivering results or not. In summary, Walter's correlation can be depicted as described in Figure 7:

Figure 7: Management Performance Levels⁷

Focus → *Results*
Efficiency → *Process*
No Focus → *Activities*

Focus on the result: individuals in this category consistently deliver the expected outcomes, considering both time and service quality.

Focused on the process: these individuals make partial deliveries, requiring constant course corrections to reach the final goal. They prioritize the process but often result in partial product or service delivery to the client.

No focus: this group works diligently but fails to deliver anything, akin to “drying ice.” Typically, they don't provide the product or expected service to the client. Essentially, Walter's analogy highlights the importance of focusing on the desired result for effective management performance.

< Lesson Learned >

It is important to assess the manager's profile before assigning specific responsibilities, as placing someone in a managerial role that is not results-oriented may require additional effort from their hierarchical superior. Maintaining ongoing efforts for alignment and focus is crucial to avoid potential issues such as failure to deliver products or services, or, even worse, the generation of unnecessary energy expenditure to achieve the final result.

-  More focus
-  Less wasted time
-  More profit

⁷ RODRIGUEZ, Martius Vincente, *Gestão Empresarial em Organizações Aprendizizes: A arte de gerir mudanças*, Editora Qualitymark, Rio de Janeiro, 2002.



CHAPTER 7

7. Change Management

Dealing with Critics and the Disgruntled

Many people experience the daily life of those who are critical by nature and permanently disgruntled, and who always end up blaming the boss for everything that goes wrong.

A rather unusual situation occurred to Vincent while managing a certain department; he realized that one of his subordinates and team managers was dissatisfied with him.

The dissatisfaction can occur for various reasons, but in this case, it was directly related to the change in management for one who liked to collect

the deliverables of their employees. The previous manager had allowed this subordinate to collect their team's deliverables independently.

Both behaviors bothered Vincent and were consistently met with justifications for why something was not done or delivered. Therefore, the deliveries were not occurring according to Vincent's demands but rather based on his subordinate's preferences.

Leadership Cases

Then, Vincent began taking action to reassign his subordinate's tasks to another professional, intending to align the deliverables with their respective timelines.

In fact, as a result of this move, Vincent ended up causing natural dissatisfaction in his subordinate, Mr. Sergei, who began complaining to his colleagues, blaming Vincent for anything that went wrong.

Given the situation, Vincent realized the proper way to reassign Mr. Sergei's tasks to individuals who could actually deliver results. But this triggered another issue - Mr. Sergei's systemic criticism of other colleagues, which he attributed to Vincent's management when things went awry.

Vincent had to think quickly and determine his course of action. For the sake of job stability, simply firing Mr. Sergei was not an option. So, what to do?

Vincent then discovered that due to Mr. Sergei's highly critical nature, there were complaints about him at the company's Ombudsman's office. These complaints were relatively minor, possibly due to Mr. Sergei's impolite manner of expressing himself when he disagreed with others.

Vincent came up with an unconventional solution to the problem. He called Mr. Sergei into his office and asked him directly:

"Dear Mr. Sergei, I've heard that you've been speaking negatively about me to others. Is that true?" - Vincent inquired straightforwardly.

Mr. Sergei was taken aback and blushed, unsure of how to respond.

Vincent continued, "Yes, if that's the case, I have a request for you, Mr. Sergei."

Mr. Sergei asked, "What can I do, Mr. Vincent?"

"Well, you have been speaking negatively about me to some extent. What I actually need is for you to continue criticizing me, but you need to be even more critical", Vincent replied.

Mr. Sergei, perplexed, shook his head and inquired, "What do you mean? I don't understand."

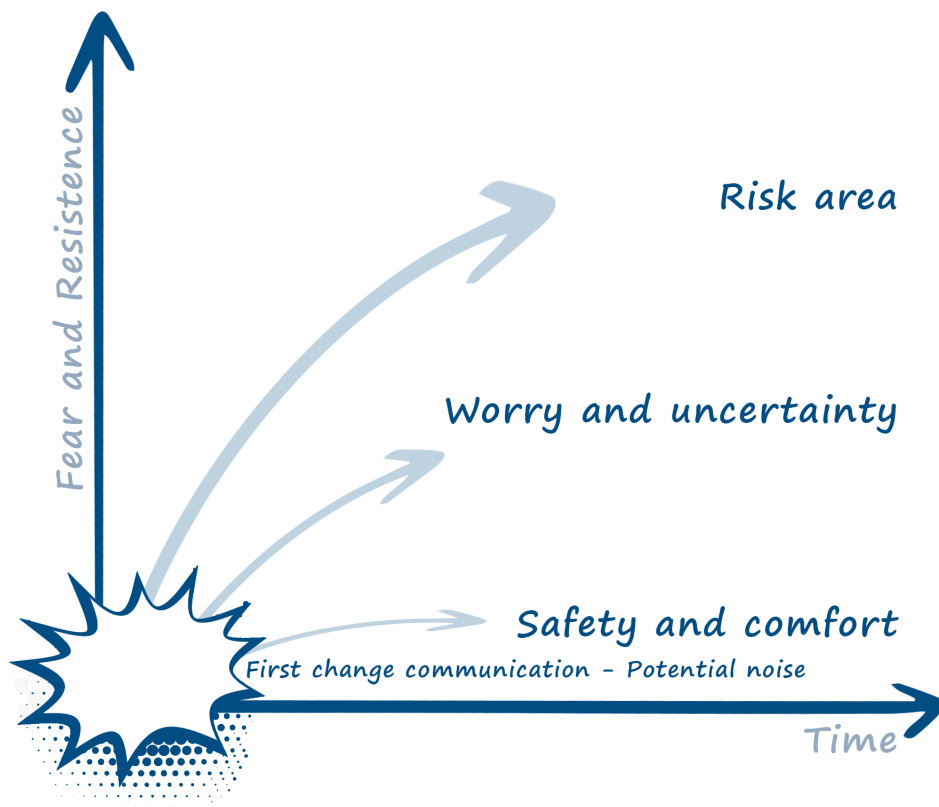
"It's simple," Vincent explained. "I have received at least two complaints that have been filed with the Ombudsman's Office, and I need to address them by hearing your perspective. So, the more you speak negatively about

me, the more it will appear to everyone that you and I are not good friends. Therefore, I will be looking to everyone on an impartial condition to answer this provider complaint against you without anyone being able to say that I am protecting you as you disagree and complain about me on many things” Vincent clarified.

Mr. Sergei was perplexed and, upon leaving the room, remarked, “Good boss Vincent, now you’ve thoroughly confused me. I don’t know what else to say.”

Since then, Mr. Sergei never spoke to his boss, Vincent, again and ended up transferring his job to another colleague, requesting his relocation to a different department, which he got around with Vincent’s assistance.

Figure 8: Attention Levels of Change Management^{8, 9}



Sometimes, people may lack clarity regarding what they need to do periodically to maintain their work or status. Therefore, an external person needs to open their eyes and guide them toward the best approach to achieve the best outcomes for everyone.

As illustrated in Figure 8, different actions are required based on the level of change management. This is demonstrated as follows:

⁸ CAMERON, Esther and GREEN, Mike, Making Sense of Change Management: A Complete Guide to the Models, Tools and Techniques of Organizational Change, Fourth Edition, Philadelphia – PA, 2015.

⁹ RODRIGUEZ, Martius Vincente, Gestão do Conhecimento e Inovação nas Empresas, Editora Qualitymark, Rio de Janeiro, 2011.

Level 1: Normal State - When the organization maintains a collaborative and normal state of organizational relationships, and professionals are interested in change, it is easy. Typically, 20% of the total desire it. At this level, we have a collaborative organizational environment.

Level 2: Alert - When this typical scenario occurs, the manager needs to act toward the change to level 1. It's usually caused by 60% of the total involved in change management. These are professionals who have doubts and lack information about the change. In this case, it is necessary to spend more time explaining in more detail what is happening. At this level, people are concerned and uncertain about their future, with dissatisfaction due to a loss of productivity and resistance to change.

Level 3: Maximum Risk - This is the most critical level that could occur and typically happens in 20% of the total involved in change management. These professionals are usually resistant to change or may lose power or status after the change, so they will do whatever it takes to prevent the change from succeeding. In this case, it is not advisable to give much importance to these individuals because nothing will satisfy them. Some may engage in change management when they realize that there will be no change, just to prevent it from happening. At this level, people experience extreme resistance, loss of key employees, high resistance, and negative external impact

< Lesson Learned >

Before penalizing or criticizing someone, try to put yourself in their shoes and understand the true reasons behind their actions. This may be difficult to do, but when you manage to do it, you will experience less suffering and gain a better understanding of the individuals involved
Correct change time.



The optimal time for change



Less wasted time



Reduce costs



More profit



CHAPTER 8

8. Communication

The Art of Effective Communication

Every year, some CEOs used to gather all their managers and communicate the strategic objectives defined by the company, which were critical to the organization's success, as a best management practice.

At the time, Robert - the CEO of the company - recognized this as a valuable practice and decided to implement it in the company where he worked. Consequently, he convened the first meeting with his direct managers, discussing various process improvement issues and essential guidance that each manager should relay to their respective teams. Two weeks later, Robert, an active and effective communicator within the company's workforce, decided to visit different departments and engage with some of the teams directly. To his surprise, the vast majority of the company's employees, particularly those within the teams managed by his direct reports, were unaware of the guidance he had provided to their managers. In essence, most of the managers had not conveyed this critical information to their teams.

Recognizing the communication breakdown, Robert used a new communication strategy to analyze what might happen and decided to reevaluate his approach. During the meeting with his direct managers, he discussed company actions and recommended that the topic remain confidential among the meeting attendees. Similarly to the first meeting, Robert began conversing with some employees at the grassroots level of the company. Surprisingly, they started asking questions about the very same issues that had been recommended to remain confidential.

Leadership Cases

Robert was annoyed when he found out that and immediately gathered his direct managers. He jokingly addressed everyone:

“Dear managers, I was surprised to discover that your entire team knows about the content that was supposed to be kept secret according to our meeting. However, when I gathered all of you and instructed that certain other pieces of information needed to be shared with your teams, they weren’t shared because the same people who should have had access to this information claimed to be unaware of the matter. How is that possible? It seems that when it comes to sharing with everyone, I’ll have to label it as ‘top secret’.”

Vincent and everyone else felt quite uncomfortable with what had happened. What had gone wrong, and how should they address these communication issues?

It is well known that, on average, only 5% of senior management desires to be the base of the organization. However, when there’s a confidential matter, human nature tends to reveal it to those closest, resulting in the secret spreading faster than usual.

Therefore, it’s not only what is communicated that’s important but also how it’s communicated. From this incident, an important lesson was learned. The summary is presented in Figure 9, where we can identify 6 crucial tips to consider in executive communications:

Short message: All ideas should be summarized in one word or sentence. Excessive speech means people will not retain the information. Have you ever watched a one or two-hour presentation and couldn’t remember what it was about, despite finding it interesting? So, if someone asks you what you heard about that, you can say “I do not remember but it was very cool!” Sound familiar? You are not the only one.

Repeat the message: All messages, especially short ones, should be reiterated through various media: spoken, email, interactive media, and printed media. Considering that individuals have their preferred media types for internalizing messages, using different forms of media will facilitate message absorption.

Be sure that everyone has understood: After propagating the message, ask individuals to explain what they have understood, repeating the message if necessary.

Use stories to convey the message: A narrative approach can be valuable in enhancing message comprehension. For example, a playful message is useful to understand the message.

Hear the message from others: A multiplier effect can be achieved by enlisting individuals who can act as message multipliers. It is also a good way to verify whether everyone comprehends the message.

Timeline to repeat the message: Establish checkpoints at intervals necessary for repeating the message.

Figure 9 - Six Tips to remember in Executive communications

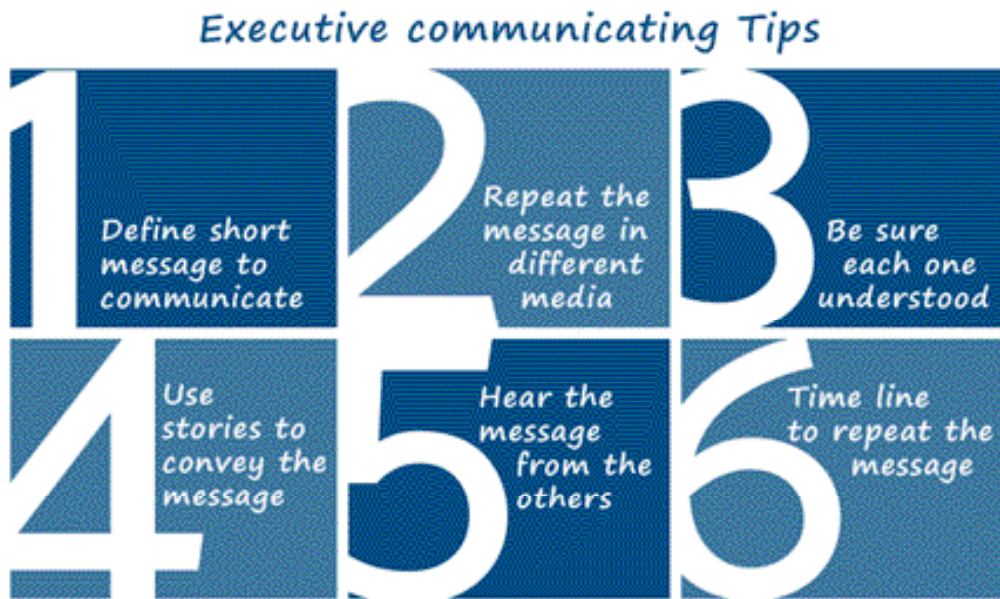
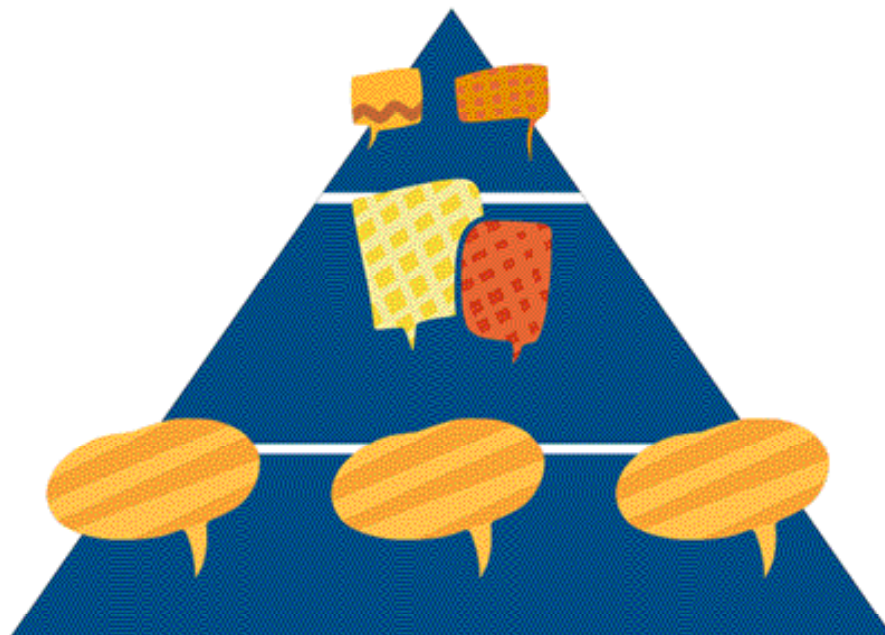


Figure 10 -Communication problems due to the high hierarchy¹⁰



¹⁰ RODRIGUEZ, Martius Vicente, *Gestão do Conhecimento e Inovação nas Empresas*, Editora Qualitymark, Rio de Janeiro, 2011.

< Lesson Learned >

Always ensure that the previous information has reached its intended destination and has been correctly understood. If there are any discrepancies or misunderstandings, make corrections to the past details and verify once more. Once there is a consistent and uniform understanding, you may need to provide additional information to ensure that everyone shares the same understanding.



Appropriate communication



Less wasted time



Reduce costs



More profit

3

HUMAN RESOURCES
[cases]



CHAPTER 9

9. Motivation

The rescue of a professional

This story dates back to 2002 when Vincent was managing the company's Corporate University. During this time, he welcomed back a professional who possessed extensive market knowledge but had low expectations regarding the company's future. In the past, this individual had left to work for another organization, driven by a combination of external challenges and a lack of internal perspective. However, he returned to Vincent's management, driven by a personal request from Mr. Raul himself. Mr. Raul humbly asked Vincent to consider his return to the University after another institution had already turned him down. This situation was complex, as Mr. Raul, an experienced individual of advanced age, appeared to Vincent as someone interested in rejoining the company but disillusioned due to past issues.

Leadership Cases

Vincent considered it and decided to accept Mr. Raul but presented him with a challenge. 'Mr. Raul, in light of your request, I'm willing to have you on board in this management, but there's a condition. Are you up for a challenge?' Vincent asked. Mr. Raul was both happy and surprised because it had been a while since he had been given such an opportunity. 'Vincent, thank you very much for accepting me into this management. It's a pleasant surprise that you're offering me a challenge, especially since you don't know me very well,' Mr. Raul said. 'Great, Mr. Raul. The challenge will involve developing a new knowledge area focused on renewable energies. You'll be responsible for organizing the first event in this field, and beyond that, you'll lead the execution of our company's first MBA program in this area,' Vincent informed Mr. Raul.

'Thank you so much, Vincent. I am eternally grateful for this,' Mr. Raul replied, still finding it hard to believe what was happening. After a few weeks, the event was nearly ready, and Mr. Raul was highly motivated and dedicated to it. He discussed the progress of the projects with enthusiasm, expressing his gratitude to Vincent for the opportunity he had been given.

The event and the MBA were highly successful, and the same MBA became the source of talent for many executives who later contributed to the company's new area of expertise in renewable energies. Vincent was pleased that he had entrusted Mr. Raul with such a significant responsibility, which made him feel valuable and accomplished through these projects. Mr. Raul, who was over 50 years old and had extensive experience, could take on various executive roles in the market while passing on his knowledge to the company to shape the new generations. This experience at the corporate university ratified the value of learning.

Figure 11 outlines the competencies that professionals can develop throughout their careers.

The vertical axis represents the flexibility and control level of professionals. Some individuals are more adaptable to specific situations, while others tend to be more rigid and control-oriented.

The horizontal axis represents the professional's active orientation. Some professionals have an external focus, while others prioritize internal aspects. This orientation can impact a professional's ability to secure external resources or create a conducive work environment. For example, a professional with a strong external focus may excel at obtaining external resources for their group. On the other hand, those who prioritize internal aspects may be more effective at organizing and fostering a positive work environment. Using this model, it is possible to identify the following types of competencies:

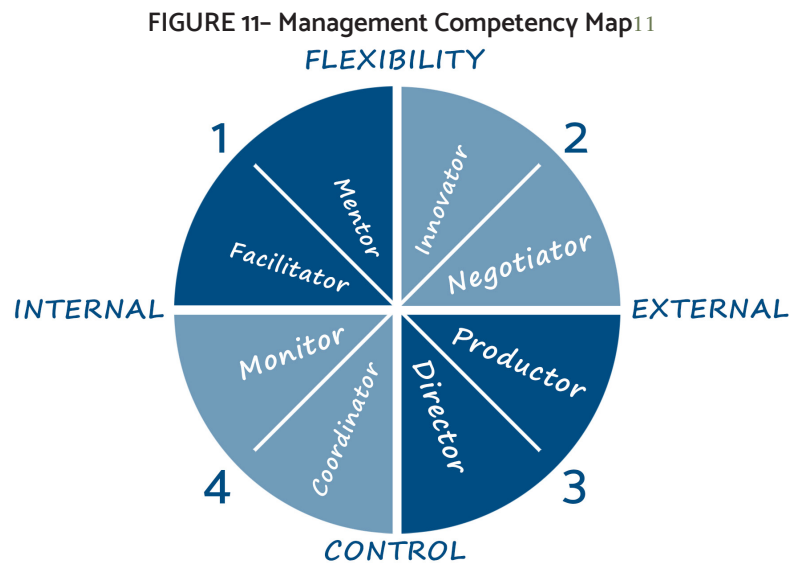
Quadrant 1: Human Resource Model: This dimension relates to commitment and cohesion, emphasizing collaborative competence. In this macro competence, the mentor competence exists when it is more flexible, and facilitator competence exists when it is more internal. This competence dimension enables engaging others in conceptualizing change and aligning in a win-win dialogue.

Quadrant 2: Open System Model: This dimension pertains to change and adaptability, emphasizing value creation competence. It includes innovator competence when more flexible and negotiator competence when more externally oriented. This competence dimension permits modeling change to others, aligning with changing reality.

Quadrant 3: Objective-Oriented Model: This dimension focuses on productivity and profitability, highlighting comprehensive competence. It





includes producer competence when more externally oriented and director competence when more control-oriented. This competence dimension permits telling others to change and aligning change targets with facts.

Quadrant 4: Internal Process Model: this dimension refers to stability and continuity–control competence. In this macro competence, there is the coordinator, when it is more control competence, and monitor competence when it is internal. This competence dimension leverages others to change, aligning the change target with established authority.



< Lesson Learned >

First, identify challenges for each of your employees because only then will they be motivated and committed to achieving the expected results. Second, help them identify the competencies and targets related to their roles.

-  1 Alignment of Objectives and Skills
-  2 More motivation
-  3 Less wasted time
-  4 More profit

¹¹ QUINN, Robert et. all, *Becoming a Master Manager: A Competing Values Approach*, John Wiley & Sons, Danvers – MA, 2014.



CHAPTER 10

10. Leader Coach

Acting as a coach

When Vincent, acting as a manager, underwent a very peculiar hiring process, he selected and hired a 54-year-old professional, Harold. However, the manager did not assign him to a specific workplace due to his age and hearing impairment, which could disrupt the required activity. So, Harold was left waiting with his packed bags while Vincent attempted to determine who the professional was and where he could be placed.

Due to his age and background, Vincent verified that Harold had already worked in several companies and had a great deal of experience in the area of processes. This was a great sign because Vincent had a lack in this area.

During the interview, Vincent also noticed Harold's keen interest in learning new things. This perception only helped Vincent to allocate him to the correct activity in which he possessed great competence and to offer him an MBA in the area of Knowledge Management, something new to him that he had a strong desire to learn.

A total success, Harold proved to be very productive and enthusiastic about new learning.

After a few years, Harold remained in the Human Resources area while Vincent worked in another area of the company. Harold then came back to seek advice from Vincent on career guidance. It began like this:

Leadership Cases

“Vincent, you helped me in the past. I want to ask you for guidance now,” Harold said.

“Okay, Harold,” Vincent responded.

“I want to grow within the company, and I see we have great open positions in the legal area nowadays. I am considering studying for a law degree. What do you think about that?” Harold asked.

“Good, Harold. Let’s think together about this option. Currently, you are 62 years old, and a law degree course takes five years to complete, so you will be 67 when you finish. You will need at least three years of experience, so you will be around 70 years old to prepare to take a position in the company. Right?” Vincent asked.

“Wow! It’s true,” Harold answered.

“Then, at this age, you will have a ‘time out,’ meaning you won’t have enough time to apply for any open positions in the area, not only because it will take time, but also because of your advanced age for the job if it still exists,” Vincent replied.

“I did not realize,” Harold said. “And what should I do then?”

“Harold, it would help if you delved into what you already know for professional growth, pursued a master’s and doctorate, and worked as a consultant to make the most of your experience. That’s what I see,” Vincent said.

“Good idea,” Harold replied.

These dialogues portray Vincent’s contribution as Harold’s coach, which was outside the process and without any interest in it, but could contribute to an exempt orientation that surprised Harold.

Figure 12 could partly explain these questions about coaching orientation, as follows:

Personal Growth: In this situation, employee motivation refers to their personal development, even if the actions do not directly contribute to the organization or colleagues.

Operational Autonomy: In this situation, employee motivation refers to their autonomy in performing functional activities. This type of person identifies value in carrying out activities and aims to achieve defined company targets.

Task Accomplishment: In this situation, employee motivation develops due to task realization. This profile is motivated when executing something in the company.

Situation A – Motivation Action: in this case, employee motivation is the best. It is the junction between three conditions: personal growth, operational autonomy, and task accomplishment. This scenery will provide one sustainable company, where the employees will be motivated, and the company will have conditions to go in the direction of your target faster than ever.

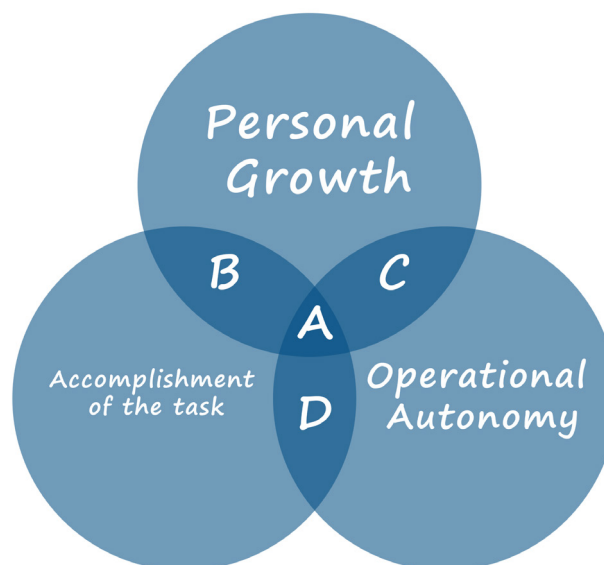
Situation B – Supervisory Action: in this case, employee motivation is due to a fusion between “Personal Growth” and “Task Accomplishment”. The employees will be motivated if the company provides this kind of circumstance.

Situation C – Employee-Centered Action: in this case, employee motivation is due to a combination of “Personal Growth” and “Operational Autonomy”. The employees will be motivated if the company provides this kind of prospect.

Situation D - Action Centered on the Organization: in this case, employee motivation is due to a fusion between “Task Accomplishment” and “Operational Autonomy”. The employees will be motivated if the company provides this kind of occurrence.

The big challenge is aligning the employees’ expectations with those of the company. This scenario would be beneficial for both if they could achieve this alignment. The coach, therefore, needs to guide the employee to reach this state.

Figure 12- Employees and Company - Expectations Aligning¹²



¹² QUINN, Robert et. all, *Becoming a Master Manager: A Competing Values Approach*, John Wiley & Sons, Danvers – MA, 2014.

< Lesson Learned >

Providing unbiased and comprehensive career guidance can significantly assist your employees, taking into account the various contextual variables in which they find themselves.



Aligning company and personal expectations



More motivation



More profit



CHAPTER 11

11. Job Rotation

How to occupy a new position if you have never worked in it

In 1986, Vincent observed how some individuals advanced quickly to higher hierarchical levels despite lacking experience in those areas, at least apparently. A materials manager once held the management of the research area with very different characteristics and focuses. This person was Mr. Silver, a very articulate and intelligent professional who, at the time, revolutionized materials management.

Silver also worked in corporate education and always enjoyed reading books, especially in management. Then, one fact caught Vincent's attention. He wrote a brief, two-page document about research and development. These pages did not criticize R&D but rather described what the R&D area should be like in the future—a futuristic view of the area. This future vision written by Mr. Silver was exciting and spread among several workers in the company. After a few months, Mr. Silver was appointed to lead the Research and Development Board. At that moment, the company's President realized that the opportunity to relocate the Directors had positioned Mr. Silver in the area he so brilliantly outlined for the future.

Leadership Cases

Vincent then realized that even in a specific management area, he could act in another potential zone to study and publicize. Vincent chose the area of corporate education as his next target. He began reading and participating in events that aligned with his vision of the future that could come to light..

In 1996, Vincent adopted a different approach to the training area, i.e., corporate education, focusing on how it had been strengthening as a significant change in this specific field. For every congress attended or book read, Vincent created an executive summary of the key topics he learned. Some of his network colleagues adopted this practice, particularly those at the decision-making level. This practice could positively influence the direction of this change.

His executive summaries began to gain recognition and requests, to the point that some colleagues asked Vincent for the same. In 2000, the creation of the Corporate University began, and Vincent then assumed a managerial position in training executives and managers. Bingo! Vincent had discovered one of the ways to take on new challenges. One executive from the same corporate university presented a stimulating rule. He stated that a manager or professional should plan their career in phases that last no more than four years. That is, before spending four years in a specific hierarchical position, they should start seeking new challenges because what they could contribute and learn should have happened within this period. If they stayed, they would continue doing the same as always.

According to Luiz Otavio, this rule would also allow adding diversified experience to their curriculum, which would enhance their employability in the face of a rapidly changing market. Vincent understood the idea and began planning what he would do in the next four years. Vincent realized that working as a manager in the planning area would be a great experience because it would provide him with a broader view of the company.

In the company, the planning department was sometimes viewed critically. This perspective stemmed from the staff's predominant focus on immediate, day-to-day tasks, which sharply contrasted with the department's forward-looking approach, aiming to prepare for an unpredictably shifting future. The findings of Kaplan and Norton in 'Strategies into Action'^{*} may underscore a similar point: effective strategy implementation is a significant challenge in many organizations. They suggest that only a small fraction of strategies are fully realized – possibly as few as one in ten – and an even smaller percentage is thoroughly understood by the workforce. This highlights a critical gap in many businesses between the development of strategic plans and their successful execution and comprehension at all levels.

How can this success be achieved? Vincent used a somewhat different strategy this time, given his close association with the corporate education area, which made it easier for him to preface and write books. Therefore, when he received an offer from a colleague who was an editor to organize the works of Harvard Business in Brazil, he seized the opportunity.

^{*} Kaplan, R. S., and Norton, D. P. (1996). *The Balanced Scorecard: Translating Strategy into Action*. Harvard Business School Press.

The books in the collection covered various management issues, ranging from innovation and sustainability to strategic planning. Vincent organized and revised the collection's translation from English to Portuguese and had the opportunity to preface some of them. After completing this stage, Vincent started using the book 'Strategic Planning' as a business card for meetings with those who held decision-making power in this area. He presented a copy of the book to the then-HR Director, Mr. Heitor, who thanked him and was flattered by the gesture. He then distributed it to other colleagues when he realized that instead of delivering a business card, Vincent had offered something much more substantial - a book.

A few months before completing four years at the corporate university of management, Vincent received an invitation to take on the human resources planning management of the company. Bingo again! The strategy worked, enhancing his peers' perception of him as a differential.

Figure 13 presents the tips that a person occupying new positions in or out of the company, which they have never held before, should remember. The following points are shown and described:

Study: After identifying the latest challenge to be undertaken, the first thing to do is to learn about this new area of knowledge if you have not yet worked in that area. It is essential to follow these steps:

First step: Begin reading a book, watching a film, or engaging in online training activities. This attitude will be the first step to start.

Second step: Start looking for a classroom course or someone with whom you could have a structured approach. In this situation, you are seeking structured knowledge and formal recognition of the knowledge obtained. Look for the best educational institution to take a course in this situation. You must invest your time in the best place.

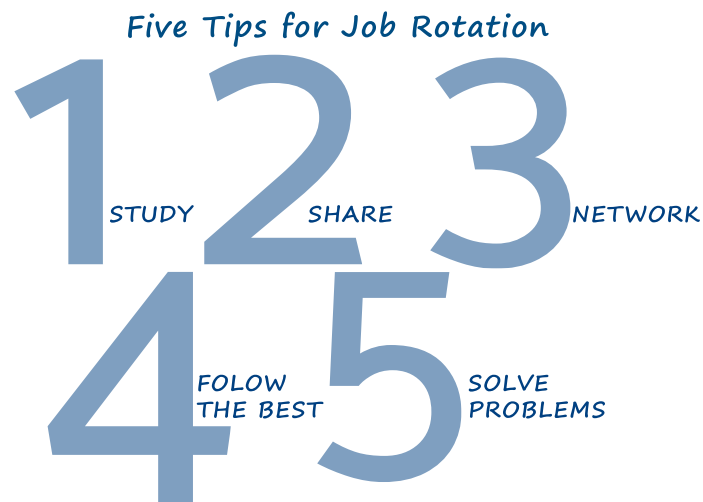
Third step: If you have the chance to learn from someone who could transfer tacit knowledge, this represents the highest level of learning. Share the knowledge that you obtain in step 1. It is important to record the knowledge you learn and share it with your network of people who could influence others to get a new position. Better to send the information to a person who holds a high position in your network, as they could influence others or make decisions about new positions. During this process, be careful to transmit information that represents the truth and always indicate the source of that information. Avoid giving your opinion if you are not a specialist yet. Thus, avoid questions that you cannot answer, and refrain from casting doubt on the information in the end.

Network: Use your existing network and build a new one dedicated to the new area you are interested in. It is important that your knowledge in other areas can set you apart and elevate you in this new field of knowledge.

Follow the best: Identify the best professionals, universities, and companies to start following their publications and activities. If possible, create a resume with all the data and share it with your network.





Solve problems: Companies and other people need professionals who know how to solve problems—no one wants to work with people who lack initiative. In the first instance, the most important qualities are individuals with initiative, ethics, and who are willing to work in groups and individually.

FIGURE 13- Five tips for job rotation and/or obtain a new position to work



< Lesson Learned >

First, identify challenges for each of your employees because only then will they be motivated and committed to the expected results. Second, help them to identify the competence and target related to their competencies.

-  1 Job rotation
-  2 More competence
-  3 Broaden networking reach
-  4 More profit



CHAPTER 12

12. Social Network

Dealing with the banana peels

It is common to have people in your management or elsewhere in the company aiming for your place, and often, you do not even know it happens.

Vincent experienced some interesting situations that generated meaningful learning. This situation occurred when Vincent began to assume a new management role in the corporate information technology sector.

In his new management role, Vincent observed that some people would not like him to take over because there already was a person in the team who acted as the eminence of the group and wanted to be the new manager.

Thus, in a group of thirty people under management, ten reliable individuals wanted to produce something positive in Vincent's new direction. Another professional, intent on obstructing Vincent, led the others by leveraging the influence of some colleagues.

In this situation, Vincent applied change management techniques to transform the current situation, rebuild, and establish a new network of relationships.

And so, it was done. The first step generated a change from individual functions to a process-based approach, allowing people to approach each other by identifying the responsibilities of each one. The change took place and lasted three months. Afterward, Vincent noted that the change brought improvements, but the connections were still not contributing to the whole.

Leadership Cases

Therefore, he decided to make a second change to redefine the roles of people and coordinators in each group. During this phase, customer service was prioritized by relocating the most reliable and experienced staff to the front line, dealing directly with customers. Meanwhile, in the back office were placed those workers who had more difficulty in relating to others and those whom Vincent did not fully trust.

Suddenly, one of the collaborators, a professional with high technical knowledge, said to Vincent:

‘Boss, I want you to get me a desk surrounded by lockers on all sides because I hate interacting with people. People are very complicated; when we say something, they question it, and I don’t like that. I prefer computers; when they don’t work, I turn them off and on, and the machines obey me.’

Vincent responded and realized even more clearly that some people were not suited to serve customers directly due to a lack of patience or skill in handling criticism. These individuals were soon moved to the back office.

This process of disassembling each group, reassembling, and then disassembling and reassembling again occurred three times. It continued until they finally had an integrated team capable of building a cohesive identity, complete with a brand recorded on t-shirts and pens, emblazoned with the team name.

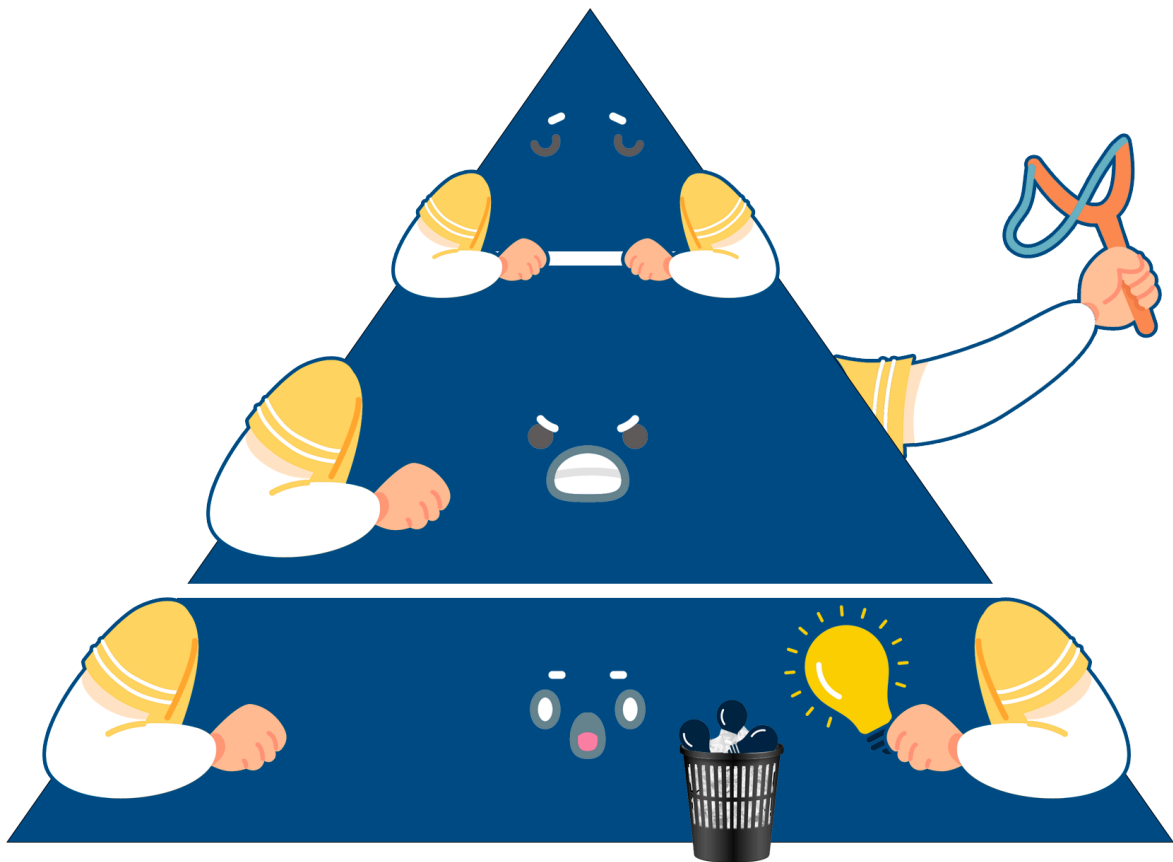
Rebuilding the team took between six months to a year, but in the end, it was worth it. Even after leaving that management role, not only did Vincent but also other team members carry with them the legacy of that team, a brand that lasts until the present day.

Figure 14 presents one of the problems that can occur in a change management process or in a situation where someone creates ‘banana peels’ for others. In this scenario, an employee with several good ideas can be blocked by his manager, who aims to prevent him from appearing as an outstanding professional, thereby overshadowing his own position. Below are the types of ‘banana peels’ that can occur:

Hiding: In this situation, the manager might hide the talented professional to prevent their own boss from recognizing the employee’s abilities. This problem often arises when the manager is insecure and fears losing their job. In such cases, a competent professional should leverage external networks to ensure their accomplishments become known to their manager’s superior.

Ghostwriter: This occurs when a manager appropriates or transforms an employee's ideas, presenting them as their own. This unfortunate situation can arise in many workplaces. Here, the professional should document significant ideas formally. However, for less critical ideas, this might not be necessary, considering that success often depends on more than just a single idea. In most cases, this approach works only temporarily. Eventually, it may become apparent that the manager excels only in copying and pasting. With today's interconnected networks and internet accessibility, such 'banana peels' are often quickly uncovered.

FIGURE 14- Dealing with the banana peels



< Lesson Learned >

Identify the social networks of the group to which they belong. These social relationships can reveal the invisible dynamics of management and organization. The real world unfolds in these social interactions, not just in the organizational chart displayed on a company's wall.



Leverage multiple networks for strategic growth



Keep the Focus



More business



More profit

4

STRATEGY
[cases]



CHAPTER 13

13. Strategy x Operational

Operational swallowing the strategic

In many companies, it is common to see a rampant race to extinguish daily fires while the managers are perpetually occupied with meetings and have little time for anything else. Vincent observed that the operational demands consume an excessive amount of managerial effort. Consequently, managers spend little to no time on strategic planning, becoming deeply immersed in daily routines filled with endless meetings and lengthy phone conversations. This often leads to a lack of awareness that they are being overwhelmed by their day-to-day tasks.

Leadership Cases

One such situation occurred when HR director Hector decided to implement a routine of holding meetings with all the managers once a week to discuss the company's future. The interesting aspect of these meetings was that initially, people felt lost, not quite understanding their purpose. Moreover, the discussions often veered into such disconnected topics that maintaining a coherent thread throughout the meeting became challenging.

In one of them, Mr. Regis, responsible for the payroll, was very nervous, and at a certain point during the meeting, he spoke: "Dear, I'm in trouble solving the payroll. If we continue with this meeting, I would like to know whom I should hold accountable if someone does not get paid this month," Mr. Regis said. The HR director was surprised and unsure what to say, so he quickly ended the meeting.

Situations like this one experienced by Vincent do not represent a point out of the curve but rather a reality that many companies experience and end up surrendering to the operational. Vincent recalled the quadrant model presented in Figure 15, where the company should focus its energies and balance between time, operation, and strategy.

Some companies dedicate their employees' time to the strategic process and leave the operational one to outsiders because they think that the direction comes from the strategic process and operational materializes what the strategic plan defined. Vincent also realized that when the company puts under the same management activities related to the construction of strategic planning with operational activities, one between them will be harmed and usually, it will be the strategic one because the operational one ends up suffocating the strategic one.

To exemplify a process of change in this direction that was well-structured, Vincent cites the case of structuring that occurred in the company in the information technology area. Figure 1 explains the cited structure above. This model defined four significant areas: The first quadrant relates to strategic planning, the second one relates to change management, the third one relates to the operation of the technology area, and the fourth one refers to customer relationship management.

In these conditions, the technology area's manager, Mr. Wash, clearly defined that those with competencies and aptitudes related to innovation, the evaluation of new products, changes, and uncertainties should be in the strategic quadrants. Those with skills and abilities related to the operation, execution of routines, and relationships with customers should be in the operating quadrants. Given this direction, people felt more comfortable as they would be aligning their skills and talents with the activities the company was offering.

FIGURE 15- Strategic and Operational balance¹⁴



¹⁴ QUINN, Robert et. all, *Becoming a Master Manager: A Competing Values Approach*, John Wiley & Sons, Danvers – MA, 2014.

< Lesson Learned >

In a company, it is crucial to clearly delineate those responsible for shaping the future, embracing the uncertainties that these activities entail, from those who handle the day-to-day operations in a predictable and systematic manner. When these distinct activities are combined under the same management, the long-term objectives are often sacrificed for short-term gains.



Spend time on strategy



Less waste of time in operations



Less cost



More profit



CHAPTER 14

14. Strategies and final target

An analogy with a race when you have not set your target

Leadership Cases

Once, Vincent was managing the education area when one of his collaborators, David, began to demand a replacement of his computer with a faster one, along with additional resources, to facilitate the creation of a new management solution. Facing a lack of resources for even more fundamental issues, Vincent attempted to convince David to reconsider the necessity of this expenditure at that time.

David argued the following: ‘Vincent, I cannot conduct my activities more efficiently with slow computers. Also, I would like to use new software, but this is impossible with outdated computers.

Vincent then replied: “Dear David, it would be interesting if we had more resources available. Still, we are in the middle of building our strategic planning and, therefore, without a clear definition of our main objectives.”

“Yes, I agree. But what does this situation have to do with my request?” David answered.

“Well, David, suppose that in defining our strategic objectives, it is identified that the activities you are currently developing need to change. So, it would mean that all the investments we have made in resources nowadays might be in vain if they do not contribute to the future vision we are drawing up,” Vincent explained

“That’s true,” David realized he hadn’t thought about that.

“It’s like a marathon,” Vincent reinforced, “if we do not know where to go, it doesn’t matter how fast we accelerate. By accelerating, we may fall faster into the abyss instead of reaching the finish line.”

This fact supports the learned issue according to Figure 16. It is possible to identify the following elements:

Process: Where the company core occurs with the activity’s execution, in the order represented by the process. Example: Software development.

Mission: Represents the company’s current main objective. Defined as a present target, it usually includes aspects such as client, product or service, geographic region, and quality expectations of the market. Example: Be the top software development company in the USA.

Strategies: Represents the approach used to realize the future vision. The path should be known primarily to the person executing the strategies. Example: Deliver high-quality products using either the owner’s or a partner’s quality assurance certification.

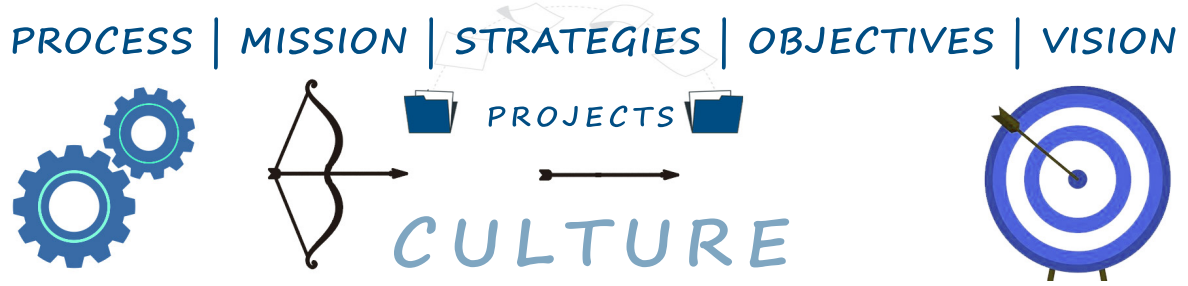
Projects: Represent the organized activities necessary to achieve the future vision, considering the defined strategy. A set of projects will be part of the project portfolio, which should be prioritized according to the available resources for execution. Example: Certification project for the top five software products delivered by the company.

Objectives: Represent the targets to be achieved in line with the future vision and are defined according to each stakeholder they represent. Example: Increase client satisfaction.

Vision: Represents the dream, the future, and the primary goal to be achieved. It should be positive and broad enough to encompass everyone in the company. Example: Become the leading software development company in the USA.

The last, but not the least important, is the culture, which represents the values of the employees and the values that strategic executives want for the company. It is the path to be considered, not the rail but the trail. Example: Profitable (for investors); dream company (for employees); desired products (for clients).

FIGURE 16- From Mission to Vision



< Lesson Learned >

First, define your vision and strategic goals, and then your main processes, to determine where to invest your time and resources - never the reverse.

- 1** Vision definition
- 2** Strategic objectives
- 3** Strategic Actions and Operational Activities
- 4** Less wasted time
- 5** More profit



CHAPTER 15

15. Strategies in the HR Area

Do they entail empowering and hiring based on future needs?

Hiring professionals for available positions is often routine in organizations. When Vincent took over the direction of human resources planning, he realized that this routine was driven by demands from various departments, which were then executed by human resources management.

Leadership Cases

The whole operation functioned like a machine: the absence of one worker was compensated by another with the same profile. Vincent posed some questions: “Where does strategic planning fit into all this? If we keep hiring what already exists, when will we innovate?” Thus, he analyzed his area. In the Human Resources Planning Department, he found mostly administrators or engineers who had become administrators. They worked operationally, replicating the human resources strategies for the company’s HR areas and continuing to hire based on area demand.

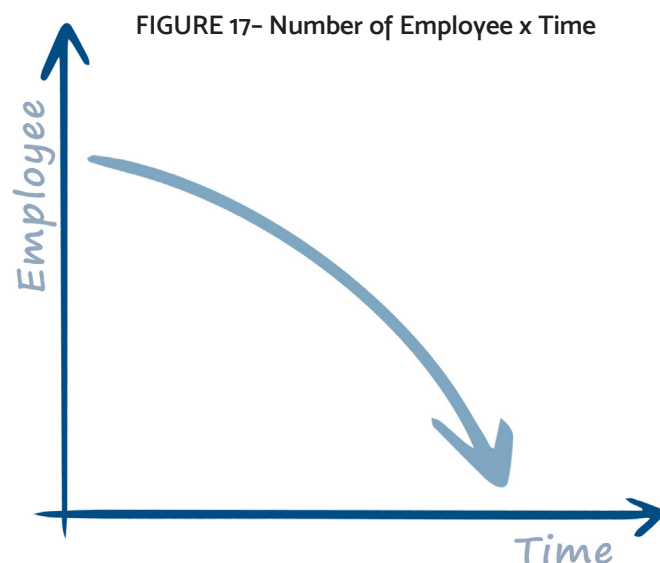
Vincent decided to innovate. Based on the company’s strategic planning, he recognized the need for different profiles than the existing ones. For example, a statistician for data processing because decisions must be data and perception-based; a financial expert, as any hiring decision and evaluation of results involved HR’s financial planning; an IT specialist as an interlocutor with the technology area; and at least one person knowledgeable about the innovation process.

In addition to these roles or skills, he identified each employee's learning vocation and encouraged everyone to pursue further studies, an MBA, or a master's degree. These changes differentiated the area of human resources planning from that moment.

From the manager's observations of natural changes, he knew he could oversee another area afterward. Thus, to guarantee the continuity of his ideas, the payment for the employees' courses was made in full. In this way, it would ensure this stimulus to employees. Likewise, these new competency-based profiles were included in the contracting plan aimed at ensuring the new professionals to work in the area. As expected, there was another change six months later. Vincent was transferred to another company area, and a new manager took over his position. Following traditional thinking, one of the first measures was to attempt to discontinue employee training, saying 'this is not a university, but a company'. However, he was prevented from discontinuing the training, as it had already been paid for.

If the new manager was able to rewind and adapt the change actions, the 'backward and forward' feedback effect of management activities would occur. The accordion effect can be minimized as solutions are developed that commit people and ensure medium- and long-term success, not just short-term gains. In this way, the new manager who took over the area gradually understood the change process and gave it continuity, as the employees were progressively adapting to these new demands and action methods.

Considering Figure 17, it is observed that during this time, the tendency is to reduce the number of employees for various reasons, such as retirement, among others. Moreover, looking to the future, it is evident that the competencies required will be different from those of current times. Therefore, the main idea is to hire new employees with a vision for the future of this company, as their competencies will certainly differ.



< Lesson Learned >

The changes must predict actions that guarantee sustainability in the medium and long term with the involvement and commitment of all people.

1

Plan future competences

2

Prepare skills

3

Align company and personal skills

4

Reduce time waste

5

Increase profit



CHAPTER 16

16. Strategies in Change Management

Turning threats into opportunities

It is common to experience change processes in organizations, and nowadays, these changes occur even more frequently and rapidly. The question is, “What should be done in these moments when changes are constant, and the company often presents a real box of surprises concerning the future?”

The fact occurred in 1994 when Vincent was acting as the manager of the information technology area. Due to market necessities and the company’s survival, its president, Mr. Albuquerque, initiated a significant change. The logic of this change was to transform the company into one that is process-oriented rather than function-oriented. The primary difference lies in that functions organize the company by areas of knowledge and departments, whereas processes organize the company by deliverables or products. Therefore, processes make companies more agile in the market, while departments can lead to companies operating in silos, which slows down the decision-making process and deliveries.

Once the change started, focus groups were formed to deal with the merger of some areas, including information technology. Thus, twelve managers from the Information Technology department were brought together. It was also determined that there would be five key processes for this department, ranging from servicing the internal use of technology to supporting the operating systems of large machines.

As the saying goes, ‘a word to the wise is enough.’ Consequently, it was understood that the current twelve managers would be reduced to five. In other words, seven managers would be redundant after the reorganization.

From this observation, it was noted that the meetings of this group, as well as those of others, became quite tense. This tension arose from the uncertainty in the air, as it was not known which managers would remain and which would be left over. Each meeting brought surprises regarding who would continue in the group. There was a case of withdrawal because one of the group members found a replacement position elsewhere. He had been absent more than three times for health reasons, which was understood to be stress generated by the change.

Leadership Cases

Vincent was unable to attend work for two days due to stress, and these two days were crucial for him as they provided time to reflect on the entire process of change. During this period of reflection, Vincent remembered the famous phrase, "Every threat is an opportunity." With this thought in mind, he returned to work after his absence with a different mentality. He was determined to turn the threat of losing his managerial role into an opportunity.

Vincent's solution was simple. He decided to learn from the change process and document his insights in a book. Having made this decision, Vincent attended all the meetings and endeavored to record everything he heard, aiming to write his first book. After three months, Vincent had completed a manuscript ready for editing. Undoubtedly, this required many additional hours beyond those spent in business meetings. Nonetheless, it became a rewarding experience, as he realized that, irrespective of his professional achievements, he would have a significant record of the entire change process at his disposal.

Therefore, with the book ready, a friend decided to help write and edit the first English version, presenting another challenge as Vincent needed to organize the effort and register with an English publisher. He managed to do so, and to complete the process, he asked the President, Mr. Albuquerque, who was responsible for the change, to write the foreword for the book. Once the implementation of the change had commenced, Vincent was offered a choice between two managerial positions. This opportunity made him feel quite accomplished, as choosing one of the managerial roles ultimately opened up significant opportunities for him in the consultancy and education sector.

Figure 18 describes how the change management process occurs. It resembles a roller coaster, with various emotions experienced at each stage, as described:

Normal Situation: During this phase, everything seems like a regular daily routine, with predictability every day.

Restlessness and Rumors: Rumors start circulating about a possible change. The employees amplify these discussions, and tension begins to rise among them.

Tension: At this moment, the employees begin to feel stressed by the possibility of changes that could occur in the company.

Worry: At this point, the employees start to think about their future. What could happen to their jobs and their monthly bills?

Shock: Finally, the rumors become reality, and the company CEO announces the change.

Denial: After the announcement, the employees try to deny it. They cannot believe what they are hearing.

Relief: With more information, the employees start to feel relieved about the changes.

Confusion: With the information about the new organizational structure and processes, the employees begin searching for new positions to avoid being laid off. This initiates a period of chaos.

Fear: After this initial phase, fear predominates among the employees, as adapting to new positions proves more complex.

Rage: Subsequently, some employees feel anger due to their inability to tackle this critical issue in their lives.

Sadness: Overwhelmed by the situation, some employees become despondent and start seeking social assistance.

Bargain: In an attempt to resolve the situation and secure a new position, some employees begin the bargaining process, where they propose changes to their roles to maintain their jobs.

Depression: This phase hits rock bottom, and some employees may experience depression.

Assimilation: The light at the end of the tunnel begins to appear, and the understanding and assimilation of change management start to materialize.

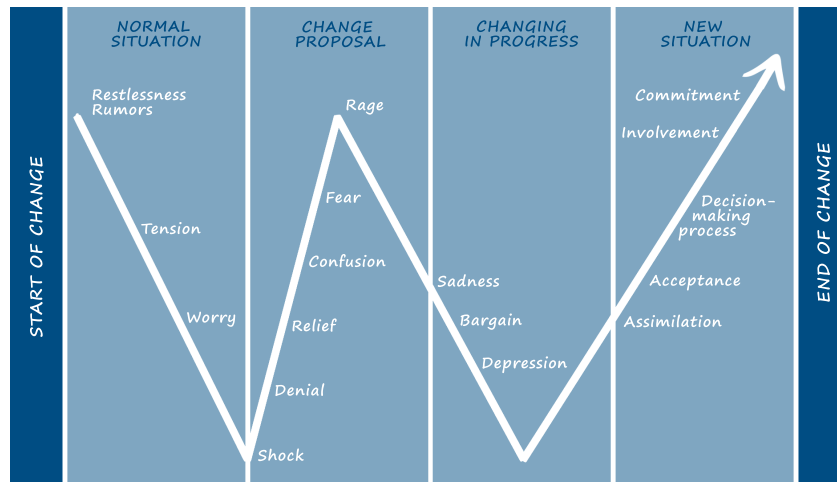
Acceptance: More than 50% of the employees accept the change and are willing to adapt.

Decision-making process: Most employees come to terms with change management. Some may refuse the change, but this is usually less than 10%.

Involvement: There is active involvement and participation from the employees.

Commitment: A commitment from more than 70% of the employees is necessary for the change management to be successful.

FIGURE 18 –Roller Coaster of Change^{15, 16}



Interestingly, another change often begins after one change management cycle ends. Nowadays, changes are occurring more rapidly, with increasingly shorter change cycles. This presents a challenge for all of us.

< Lesson Learned >

Learn to transform significant changes and challenges into personal and professional growth opportunities. It is the best time to grow as a person and professional.

- 1 Engage in change management
- 2 Reduce time waste
- 3 Reduce costs
- 4 Increase profit

¹⁵ CAMERON, Esther and GREEN, Mike, Making Sense of Change Management: A Complete Guide to the Models, Tools and Techniques of Organizational Change, Fourth Edition, Philadelphia – PA, 2015.

¹⁶ RODRIGUEZ, Martius Vicente, Gestão do Conhecimento e Inovação nas Empresas, Editora Qualitymark, Rio de Janeiro, 2011.



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[Martius Vicente Rodriguez y Rodriguez]

BUSINESS MANAGEMENT

Behind the Scenes

Histories that make you think about how to obtain gains from your everyday experience

Martius Vicente Rodriguez y Rodriguez, DSc. is Vice Director of Administration Faculty from Universidade Federal Fluminense (UFF - Brazil). Pós-doctor at Administration (UFRJ/Harvard Business School). Mini-Mba in MIT/Sloan. Titular professor of Administration - UFF. Manager in Human Resources, Marketing and Information Technology in Oil and Gas Industry (1978-2010). Wrote and organize 60 books related to strategic, management, innovation, knowledge management.



Master and doctoral advisor for more than 200 theses.

