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## 1. Introduction

The Management Forum (MF) model lends itself to diffusion at the community level for the analysis of key competences in management and business development. In particular, the MF shows itself to be suitable for contextualising themes of development of managerial competences with respect to the particular characteristics of the economic and competitive fabric that characterise the productive context of the various countries, taken into consideration also from the viewpoint of benchmarking.

It is clear that an effective approach to the analysis of managerial training needs cannot be carried out without guaranteeing a tight correlation with companies' peculiarities and with contexts where they operate through managers and entrepreneurs.

The same model also provides another essential element for characterising the quality of the approach to the examination of managerial competences, or rather the personalisation of the analysis at the level of the individual manager and entrepreneur involved, with the possibility of activating a comparison with the results gathered overall or using subsamples as reference.

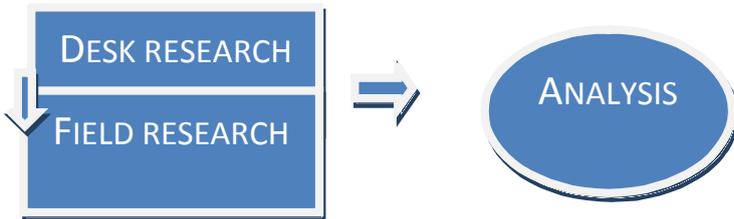
To be used as input for human capital development policies in the countries in question, the results of the analysis are compared and validated through an accurate comparison in the field with the main actors of the business community, with the institutions, the associations and with the training supply structures. This last is another founding characteristic of the MF model that guarantees the diffusion of the model in different contexts.

The **Emme project** intended to transfer the structure, methodology and tools adopted from the MF in three European countries (Greece, Romania and Spain) with the goal of reproducing the model and making it usable in different contexts and territories.

At the base of the transfer, therefore, there was not a single product but the structure, the methods and the tools used during the MF activity that was applied, tested and transferred thanks to the participation of the project partners.



Specifically, we are referring to a well-defined structure based on broad areas of activity and related outputs:

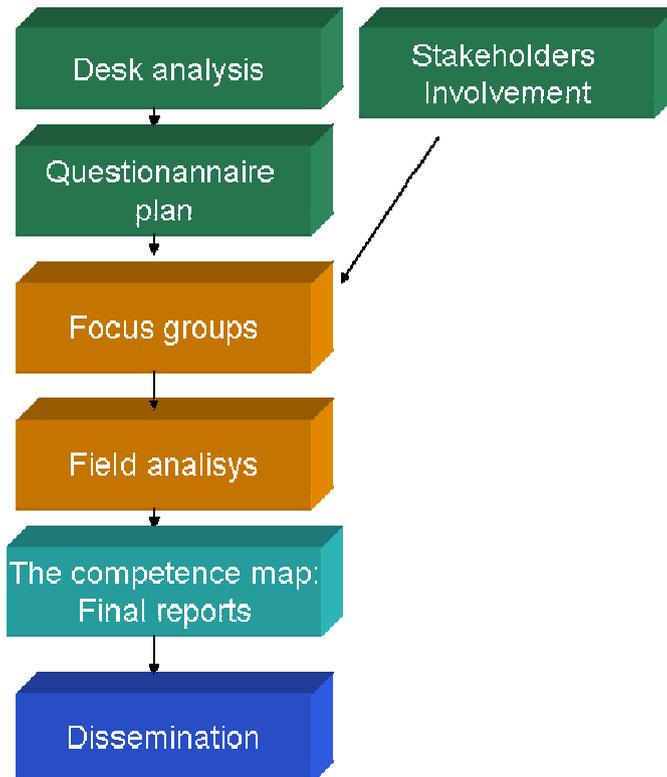


The activities were closely connected because the research, which was carried out over the project life cycle, fostered the analysis phase through the identification of themes and the results which come out during the project activities. In the meantime the research used the outputs of analysis activity as an input to field research and focus groups.



## 2. The EMME Model

The present guideline provides experts of EU countries with a handbook to use in planning activities to realize the EMME model in their country. To go in this direction we will briefly discuss each step of the following process. The competence map will be specially focused to provide a guideline for the definition of managerial competences.



## 2.1 Stakeholders involment

This task is crucially important. The success of the EMME model is highly dependent on how the EMME model applicant is able to involve the stakeholders. Firstly, it is necessary to identify a pool of institutions (public &/or private) with suitable experience and competence in the field of research and managerial training. These will have the role of promoters and actuators of the analyses at national level. From experiments carried out with the EMME project a series of conditions have emerged which can guarantee a model that is more replicable at the European level.

The peculiarities of the MF and its aims make participation by associations of business representatives and managers more opportune than ever. These types of organisation can in fact boast the mixture of knowledge of the managerial market, of the entrepreunerial fabric of the country and of networking that can guarantee the success of the entire initiative.

The following table gives a synthesis of a successful stakeholders' involvement.

### 2.1.1 Practical suggestions

#### WHAT?

Stakeholder involvement is the early and extensive engagement of stakeholders along the EMME process of planning, research, and implementation. Stakeholders are those effecting change in the community and those affected by it. Stakeholder collaboration uses a stakeholder group with sufficient authority to apply collaborative learning and conflict resolution techniques to formulate effective and acceptable decisions.

#### WHY?

Traditional public participation methods of informing publics?? and obtaining their feedback on project and program proposals have not been effective in engaging citizens in community decisions and in resolving conflicts. Stakeholder involvement has three objectives:

l) Avoid Conflict: collaborative efforts aim to engage stakeholders in a process of resolving conflicts among themselves through negotiation, mediation, and collaborative learning.



II) Develop a "Shared Vision": collaborative efforts intend the stakeholders to come up with a vision or direction that they can agree to and buy into.

III) Formulate Creative Solutions: all collaborative efforts hope to use dialogue and group processes to develop creative solutions that may not have emerged from traditional planning exercises.

## WHO?

Stakeholders for the EMME model are those effecting change in the community and those affected by it. These may include government agencies, entrepreneurs, industrial associations, managers, trade unions, community and other interest groups, non-governmental organizations. The list of stakeholders will depend on the country. It should be as inclusive as possible, and stakeholders can be added as time goes on.

## WHEN?

It is important to begin stakeholder involvement early in the process before interests become entrenched. However, the adage "better late than never" holds true here. While more difficult than starting early, in many cases stakeholder collaboration at a later stage of a process has helped resolve conflict.

## WHERE?

The location of stakeholder meetings should be left to the stakeholder group.

## HOW?

- Identify stakeholders
- Organize stakeholder groups
- Create opportunities for involvement
- Provide the most appropriate forum for input
- Resolve conflicts

## STRENGTHS & LIMITATIONS

Stakeholder involvement and collaborative decision-making represent a high level of participation and a goal for a wide range of projects. However, it is not easy, and must be complemented in many cases with conflict resolution.



To achieve effective collaboration, a number of conditions or prerequisites are needed, including:

- Good information
- Time to participate, to build trust, to learn, to resolve disputes, to create solutions
- Commitment of participants
- Willingness to learn among participants
- Shared authority and responsibility to affect and implement decisions

Conversely, the lack of any of these conditions serves as a barrier to collaboration. Misinformation, insufficient time, lack of commitment and responsibility, entrenched positions, or uneven authority can undermine the collaborative process. In addition, if litigation or legal precedent is a goal of certain stakeholders, collaboration clearly will not work.

## 2.2 Desk analysis

The activity is the necessary investigation through main surveys and statistics on management at a national level, in order to draw up the scenario. Particular attention should be dedicated to SMEs (the main target of EMME model).

### 2.2.1 Example of sources to consult

- the most reliable institutional sources (such as Institute of Statistics, National Bank),
- surveys promoted by the social partners (employers' associations and unions),
- specialised data banks and analyses carried out in the framework of Community programmes or international programmes (OECD) for benchmarking will be used.

<http://epp.eurostat.ec.eu.int> (Eurostat)

[www.bdo.co.uk](http://www.bdo.co.uk) (on family businesses)

[www.europa.eu.int/comm/enterprise/entrepreneurship/support\\_measures/transfer\\_business/](http://www.europa.eu.int/comm/enterprise/entrepreneurship/support_measures/transfer_business/) (on continuing business activities)

[www.fbn-i.org](http://www.fbn-i.org) (on family business networks, leadership quality improvement and family business management)

[www.iefamiliar.com](http://www.iefamiliar.com) (European Group of Family Enterprises)



[www.imf.org](http://www.imf.org) (International Monetary Fund)

[www.oecd.org](http://www.oecd.org) (OECD – Organisation for economic cooperation and development)

## 2.2.2 Suggested index

### Part I National economic trends

As compared to international dynamics; domestic consumption, investments, exports; GDP data; productive structure; most important sectors for industrial production; annual average growth rate; labour productivity; business indicators; employment structure; presence of industrial zone; competitive strategies adopted; comments. Technological innovation, competitiveness and entrepreneurship

Investments in Research and Developments, Research and development expenditures in SMEs and in large enterprises (benchmark with European competitor); capacity for innovation (benchmark with European competitor) and role of managers in innovation processes;

### Part II Manager profile

Age, sex, educational qualifications, professional mobility, sector of activity; career upgrading and managerial development; demand for management from SMEs in terms of employment of high skills profiles and competences requested.

### Part III The role of training in managerial and organisational competence development

Participation in training (males and females); geographic and sectorial distribution; tools and methods to survey training demand (questionnaires, interviews, meetings...); training objectives (specialization, requalification, employment maintenance); innovative aspects (of process, of products, of organization); main themes and methodologies; tools and methods to survey monitoring and evaluation.

## 2.3 **Questionnaire plan**

The questionnaire should be drawn up on the basis of the managerial competence model developed by Fondirigenti and used in the framework of



Management Forum. It includes a grid to outline either the most relevant managerial competences and skills or those to be improved.

The objective of the questionnaire is to provide a balance of managerial competence but also to offer a tool for sketching the distinctive characteristics of companies and managers / entrepreneurs based on the presence of some critical success factors and on the level of achievement of 16 managerial competences / skills.

The questionnaire also allows interpretation of the links between managerial skills and the competitive performance of the company.

Some crucial variables should be identified, first measuring the target competitive position, and then marking the skill and competence needs (and related training programmes to develop them). The questionnaire intends to assess both the competitive differential on target markets and the competence and skill gaps to be overcome, with a view to improving competitive position.

The questionnaire also investigates business trends, often implicit, however not necessarily formalized through strategic plans, and the organizational models adopted - often informal - that play a critical role in translating the strategic guidelines into competitive solutions, to guide organizational behaviour of actors in the enterprise, to settle, combine, maintain and develop new knowledge through the change of structure of organizational routines

The questionnaire should have a conical structure, starting with an overview of company performance and business trends in the industrial sector to detect the skills of individual managers. The sections suggested are organized according to groups of variables including: intervening variables (technological innovation, internationalization, agreements and territorial dimension) particular variables characterizing the company (competitive position, strategy, organizational models, management structure and dynamic structure of human resources), perspective variables (career and training paths of management).

It is suggested that CAWI software is used to submit the questionnaire.

## 2.4 Focus groups

Focus group methodology consists of collecting qualitative information through collective interviews with several people gathered in the same place. Focus groups allow the examination of how the personal attitudes and opinions of participants are built, in their social and relational dimension. In this way we can



draw up an individual assessment, which is the result of a social process. A focus group provides data for analysis, gathered in a less formal format, exchanging information related to the topic or group of topics for which the data are being collected. The insights and data produced by the interaction of participants in focus groups can provide feedback to initiate change or improve services, confirm satisfaction with services or help generate new hypotheses.

For the EMME model focus groups are useful for testing the questionnaire, and lead to a definitive identification of the **reference target**, that is the managers and entrepreneurs directly involved in the study. The target should be as representative as possible of the productive and managerial fabric of the country in question. In this way the results of the analyses can adhere as much as possible to the real growth requirements of the various areas. Again at the level of the target it is clear that the model lends itself to be used with greater success in situations characterised by a large number of SMEs which need greater support than large enterprises.

## 2.5 Field analysis

The field analysis is carried out through a semi-directed interview, supported by the questionnaire (see 2.3) and a CAWI research. Interview planning in different local areas is implemented further to previous contacts with the local employers' association, which is in charge of establishing the time schedule of interviews together with the companies it represents. The employers' association is involved, too, in analysing and validating the sample of local companies.

The interviews are addressed to the entrepreneur, to representatives of the ownership performing managerial tasks, with the managers. The technique used for the interviews is meant to foster a voluntary contribution from the interviewees, in addition to the answers and to the structure provided by the questionnaire, which ensures a homogeneous approach to the survey.

The interview result is thus represented by the questionnaire filled in by the interviewer and a set of qualitative inputs on specific items, interesting case studies of companies or from the daily experience of the interviewee as related to the company activities in which s/he has been involved.

The questionnaire is by no means exhaustive as it concerns information collected through the interviews. The information potential of the questionnaire, completed by

the interview reports, is enriched with the feedback collected during the phase of in-depth analysis, through the focus groups.

The questionnaire can be delivered at distance (via web, e-mail, phone or mail) in order to ensure the best value for money in the realisation of this activity.

The direct involvement of the main actors in the local business community is very important. Workshops and seminars are important tools for this sensitization activity. Stakeholder involvement is very important in this phase, to avoid the research to be sealed off the real business environment of the territory.

## 2.6 The competence map

The competence map is one of the most important outputs of the EMME model. In this grid we summarize the most important competences useful to management involvement.

The four parts of the competence map are:

1. Technical and managerial competence: refers to individual knowledge of technical aspects and management of business tools
2. Behavioural skills: refer to individual skills to set up relationships/to interact with company stakeholders
3. Design skills: individual skills concerning cognitive aspects
4. Managerial skills: individual skills concerning company governance

In fact, the goal of the EMME model is to base education training programs and methodological approaches on competences.

Therefore, following the EMME model training must be based on competency. This is an approach to vocational education and training that places emphasis on what a person can do in the workplace as a result of completing a program of training.

Competency standards are industry-determined specifications of performance that set out the skills, knowledge and attitudes required to operate effectively in a specific industry or profession. Competency standards are made up of units of competency, which are themselves made up of elements of competency, together with performance criteria, a range of variables, and an evidence guide. Competency standards are an endorsed component of a training package.

Thus, the competence Map that the EMME model produces must refer to the specific market sector and territory where the managers work.

For a manager to be assessed as competent it is necessary to demonstrate the ability to perform tasks and duties to the standard expected in employment. Managerial training suggested in these guidelines focuses on the development of the skills, knowledge and attitudes required to achieve those competency standards.

One of the primary features of a training project should be that each learner's achievement is measured against competency standards rather than against the achievement of other learners.

Under this approach, each learner is assessed to find the gap between the skills they need and the skills they already have. The difference between the two is called the skills gap. A training program is then developed to help the learner acquire the missing skills.

**Skills required – current skills = skills gap**

In many cases the learner has no current skills and the training program is a full curriculum-based course. However, the learning outcomes achieved through the curriculum are derived from the competencies acquired in a training course.

Programs are often comprised of modules broken into segments called learning outcomes, which are based on standards set by industry, and assessment is designed to ensure each student has achieved all the outcomes (skills and knowledge) required by each module.



### 2.6.1 The competence model

The four broad categories that the EMME model divides competence and skills into are presented in the following table:

<p style="text-align: center;"><b><u>TECHNICAL AND MANAGERIAL COMPETENCE</u></b></p> <ul style="list-style-type: none"> <li>▶ Technical/professional</li> <li>▶ Managerial</li> </ul>	<p style="text-align: center;"><b><u>BEHAVIOURAL SKILLS</u></b></p> <ul style="list-style-type: none"> <li>▶ Personal relationships</li> <li>▶ Self-management</li> <li>▶ Communication</li> <li>▶ Negotiation</li> </ul>
<p style="text-align: center;"><b><u>DESIGN SKILLS</u></b></p> <ul style="list-style-type: none"> <li>▶ Logical/analytical</li> <li>▶ Summarizing</li> <li>▶ Problem solving</li> <li>▶ Creativity</li> <li>▶ Learning</li> <li>▶ Holistic view</li> <li>▶ Strategic view</li> </ul>	<p style="text-align: center;"><b><u>MANAGERIAL SKILLS</u></b></p> <ul style="list-style-type: none"> <li>▶ Leadership</li> <li>▶ Entrepreneurial</li> <li>▶ Decision-making</li> <li>▶ Integration/organization</li> <li>▶ Innovation</li> </ul>

The set of competences identified and reported in the questionnaire consists of:

#### TECHNICAL AND MANAGERIAL COMPETENCE

- Business competence (technical)
- Managerial competence

#### DESIGN SKILLS

- Logical / analytical, synthesizing
- insight and creativity
- problem solving
- learning

#### BEHAVIOURAL SKILLS

- Capacity for personal relationships
- Autonomy
- Communication
- Negotiation
- Flexibility

#### LEADING SKILLS

- Leadership
- Decision-making
- Attitude to risk / entrepreneurial skills
- integration
- Holistic view
- Timeliness / strategic view

#### 2.6.1.1 Technical and managerial competence

- Business competence (technical)

that is, to “know how” in relation to critical factors of business success as a whole and/or of its aspects in the activities of value chain

- Managerial competence

that is, to “know-how” in relation to optimization, monitoring and integration of the whole business management, of several business units or functional fields, targeted at ensuring a cost-benefit-effective and financially sustainable process

#### 2.6.1.2 Design skills

- Logical / analytical and synthesizing

The logical and analytical skills concern splitting up the whole system into its simple parts, indicating hierarchies and relations. The capacity to synthesize, on the contrary, concerns the achievement of indicators describing simple structureless data, and the application of theoretical knowledge targeted to the application and revision of a concept.

- insight and creativity

Ability to develop something original, innovative and unique. Creativity is set out into four different and complementary phases: preparation, incubation (conceptual phases), inspiration (motivational phase and breaking out of schemes) and assessment (operational phase).

- problem solving

that is, ability to provide solutions even when basic information or reference models are lacking and to distinguish cause-effect relationships, data and queries in a logical process, so as to resolve critical points and technical, organizational, business and relational problems which are generated as a rule by complex and stormy processes.

- learning



A wide range of abilities which reflect the need to manage and develop the tacit dimension of knowledge and to adapt technologies and ideas developed in other frameworks to company business. The learning skills can be discovered when an individual goes through an entire cycle of experience in its four steps: practical experience, observations and reflections on experience, abstraction and concept design of experience, assessment of concepts worked out in other frameworks.

### 2.6.1.3 Behavioural skills

#### - Capacity for personal relationships

Ability to set up good personal relationships, developing trust in internal and external business relationships. It implies a strong motivation towards a subsidiary approach, that is an aptitude to establish relationships with the members of the group the subject belongs to rather than to perform the task assigned.

#### - Capacity for autonomy

Ability for self-determination and self-management in the framework of a broad organization, even if it is under the control of boards in charge of ensuring the legitimacy of acts to be performed. The degree of autonomy when playing a role can be expressed from the period of time in which the activities are carried out at one's discretion. This ability to bear uncertainty is supported both by intelligence and by emotivity. A lively intelligence cannot balance alone emotional instability and rashness in the workplace.

#### - Communication skills

Ability to reach a target group within or out of the company organization with a well defined message and using the available media. As different types of messages and tools/technologies are available, communication skills concern also the prompt and appropriate use of several media in order to facilitate a broad dissemination of business information within and out of the company.

#### - Negotiation skills

Ability to exchange ideas, looking for balance and compatibility both at the organizational level and at the psychological and relational levels, in order to manage successfully possible conflicts resulting from organization and management dynamics.

This ability includes the search for a compromise between two or more parties with miscellaneous interests and the proper use of one's own contractual power.



- Flexibility

This is the ability to change effectively through adaptation to variable situations or conditions. It discloses at the cluster level the capacity of the organization to react to pressure from outside or to anticipate needs. It is characterized by a strategic focus on the outer environment.

2.6.1.4 Leading skills

- Leadership

The capacity to exert influence, either using formal hierarchies or not, to persuade and motivate superior officers or senior managers/peers/subordinates to achieve the objectives set up. It can be disclosed in different forms and, according to the most acknowledged opinions, it varies from one framework to another (situational leadership).

- Decision-making

Ability to evaluate the appropriateness of information needed as well as the understanding of the framework in which decisions are taken. It is disclosed in the subtle management of trade-off between timeliness and effectiveness.

- Risk-oriented / Entrepreneurial skills

Ability to grasp the business opportunities provided within the company and by the outer environment, assessing their benefit in terms of financial risks and return on investment. It consists of tolerance towards informal approaches and tendency to reduce the use of mechanisms resulting in steady behaviour in order to control complex management conditions.

- Integration skills

Ability to focus the work of more individuals or working units on the achievement of a high-level common objective. It results in a combination of specific knowledge and cultural approaches to provide solutions.

- Holistic view

Ability to see specific business problems and working units (microstructures) as a whole and to consider the business organization system as an ongoing process.

- Time perspective (strategic view)

Trend to grasp the evolution of the markets and the institutional environment in the time dimension and to balance short-term feedback with long-term results, as well as the ability to update the objectives set up (feedforward).



## 2.6.2 Competence revelation tool

The following table shows how to point out the information for the competence map.

<i>For each variable give a score from 0 (none) to 5 (very good)</i>			<i>For each variable give a score from 0 (none) to 5 (very good)</i>				
	Relevance	Current skills	To be improved	Relevance	Current skills	To be improved	
<b>Technical and managerial competence</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<b>Behavioural skills</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Technical competences	<input type="text"/>	<input type="text"/>	<input type="text"/>	Communication skills	<input type="text"/>	<input type="text"/>	<input type="text"/>
Managerial competences	<input type="text"/>	<input type="text"/>	<input type="text"/>	Negotiation skills	<input type="text"/>	<input type="text"/>	<input type="text"/>
				Self-management	<input type="text"/>	<input type="text"/>	<input type="text"/>
				Independence	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Analytic/design skills</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<b>Leadership skills</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Problem solving skills	<input type="text"/>	<input type="text"/>	<input type="text"/>	Entrepreneurial skills	<input type="text"/>	<input type="text"/>	<input type="text"/>
Creativity	<input type="text"/>	<input type="text"/>	<input type="text"/>	Leadership skills	<input type="text"/>	<input type="text"/>	<input type="text"/>
Learning capacity	<input type="text"/>	<input type="text"/>	<input type="text"/>	Integration skills	<input type="text"/>	<input type="text"/>	<input type="text"/>
Logical/analytic skills	<input type="text"/>	<input type="text"/>	<input type="text"/>	Insight skills	<input type="text"/>	<input type="text"/>	<input type="text"/>
Ability to summarize	<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
Interpretation skills	<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>

## 2.7 Dissemination

Finally, **the use of results**, which must be optimised both for the individual managers and entrepreneurs involved and for the training institutions that will use the data and overall results.

The goal of the MF is that of stimulating a virtuous cycle of comparison between the different subjects on the theme of managerial development, with the intention of improving employability, competitiveness and the quality of the training supply. In this sense the timing for diffusing results at the territorial and on-line level is important. The objective will be to activate that virtuous cycle of feedback and feedforward on the results obtained, on the points to be improved on and the strong points. Dissemination can be achieved through workshops and congresses but also through multimedia learning objects that summarize the research results. A very important area of dissemination is the training agencies to lead them in a innovative way of education training design, focusing, first of all, on competence to narrow the gaps