

## At-a-glance checklists

February 2017

Developing  
managers to  
manage *sustainable*  
employee engagement,  
health and well-being

# How to use the ‘at-a-glance’ overview of the checklists

Factors for management development success (generated from our previous research) were categorised into three levels, based on the research findings. Level 1 factors are those that the research showed most respondents had considered, level 2 factors are those that some respondents had considered, and level 3 factors are those that most respondents had not considered. For ease of

use, these have been highlighted using different shades (see key below). Therefore, when using these at-a-glance checklists, organisations should at first ensure the pink factors (level 1) are in place before moving onto purple and grey (levels 2 and 3), as these factors are more likely to be in place in organisations with mature development programmes.

## Key:

Level 1

Level 2

Level 3

## Checklist stage 1: Before the development programme

**METHODOLOGY** – Considerations for planning, design and format of the programme that support success

### LEVEL 1

USE a series of interventions over time.  
INTEGRATE the programme into organisational strategy.

### LEVEL 2

CONSIDER the resources available.  
ENSURE opportunities for participants to apply their learning.  
MAKE participants accountable for their success on the programme.  
USE a range of different delivery formats.  
ENSURE shared departmental responsibility for the programme.  
MAKE the programme useful, beneficial and important to all.

### The following factors have also been found to be important:

MAKE programme goals SMART.  
CHOOSE a good, organisationally relevant name for the programme.  
SET multiple aligned goals for participants.  
GET senior management support.

**MANAGER** – Considerations for planning, design and format of the programme that support success

### LEVEL 2

PROVIDE support and feedback to managers to increase their management skills.

### LEVEL 3

ENCOURAGE managers to value learning and development.  
INVOLVE those participants most likely to learn.  
BUILD self-awareness in managers and recognition of themselves as leaders.

**ORGANISATION** – Considerations for planning, design and format of the programme that support success

### LEVEL 2

HAVE a supportive culture with open dialogue, mutual respect and recognition.  
SHOW support and recognition of, and commitment to, health and safety.  
DEMONSTRATE support for innovation and initiative.  
BUILD a culture where employees feel empowered.  
ENSURE organisational policies and processes are accessible and helpful.  
LET managers know what their role is.  
LEAD by example.  
ENSURE opportunities for development.  
ENSURE managers are supportive of others' learning.

### LEVEL 3

GET senior managers to engage with others.  
ENSURE managers focus on both task and people.  
SET clear standards and expectations for managers.

### The following factor has also been found to be important:

PROVIDE meaningful work for all.

## Checklist stage 2: During the development programme

**METHODOLOGY** – Considerations for planning, design and format of the programme that support success

### LEVEL 1

USE a series of interventions over time.  
 CONSIDER ongoing availability of resources.  
 INTEGRATE the programme into organisational strategy.  
 GET leadership support for the programme.  
 ENSURE opportunities to apply new learning.  
 MAKE programme goals SMART.  
 MAKE the programme useful, beneficial and important to all.  
 ENSURE the programme content is relevant to, and reflective of, manager participants' job roles.  
 PROVIDE opportunities to practise, and get feedback on, their learning.

### LEVEL 2

SET multiple aligned goals for participants.  
 HOLD participants accountable.  
 USE a range of different delivery formats.  
 CHOOSE the right programme name.  
 ENSURE programme goals/actions are integrated into performance appraisal/review system.  
 PROVIDE mentors, coaching and feedback support for participants.  
 CONSIDER ways to build collaborative working in the participant group.  
 CONSIDER ways to ensure the group facilitator builds and develops trust.  
 BUILD participants' confidence.

### LEVEL 3

DEVELOP a range of pre-training activities.  
 USE after-event reviews.

**MANAGER** – Characteristics of manager participants that support programme success

### LEVEL 1

ENSURE managers are satisfied in their work and see it as meaningful.

### LEVEL 2

ENCOURAGE managers to value the learning and development opportunity.  
 INVOLVE those participants most likely to learn.  
 ENSURE managers feel they can succeed.  
 BUILD self-awareness in managers and recognition of themselves as leaders.  
 HELP managers see the programme as beneficial and important.  
 ALIGN manager and organisational values.  
 MAKE sure managers are not in roles with conflicting goals and priorities.  
 VOLUNTARY participation.

**ORGANISATION** – Characteristics of the organisational environment that support programme success

### LEVEL 1

SHOW support and recognition of, and commitment to, health and safety.  
 LET managers know what their role is.  
 PROVIDE meaningful work for all.

### LEVEL 2

HAVE a supportive culture with open dialogue, mutual respect and recognition.  
 DEMONSTRATE support for innovation and initiative.  
 BUILD a culture where employees feel empowered.  
 ENSURE organisational policies and processes are accessible and helpful.  
 GET senior managers to engage with others.  
 LEAD by example.  
 ENSURE managers focus on both task and people.  
 SET clear standards and expectations for managers.  
 ENSURE opportunities for development.  
 MAKE sure priorities don't conflict for managers.  
 ENSURE peer, team and social support for managers.  
 ENCOURAGE good-quality team relationships.  
 ENCOURAGE teams to trust in, and identify with, their manager.  
 BUILD cohesive working teams.

### Checklist stage 3: After the development programme

**METHODOLOGY** – Considerations for planning, design and format of the programme that support success

#### LEVEL 1

CONTINUE to use a series of interventions.  
 CONSIDER ongoing availability of resources.  
 INTEGRATE the programme into organisational strategy.  
 SET multiple aligned goals for participants.  
 KEEP senior management support.  
 ENCOURAGE participants to seek opportunities to apply new learnings.  
 CONSIDER a range of post-training activities.  
 ENSURE programme goals/actions are integrated into performance appraisal/review systems.  
 ENSURE continued shared departmental responsibility for the programme.  
 MAINTAIN opportunities for participants to practise, and get feedback on, their learning.  
 EMBED learning using action learning sets/guided learning sets.  
 MAKE participants accountable for applying their learning.  
 CREATE opportunities for participants to teach others what they have learned.

#### LEVEL 2

USE after-event reviews.  
 CONDUCT follow-ups with participants.  
 USE visual aid reminders to practise learning.  
 USE a mentor/peer/colleague to hold participants accountable for applying learning.

**MANAGER** – Characteristics of manager participants that support programme success

#### LEVEL 1

ENCOURAGE managers to value the learning and development opportunity they have been given.  
 FOCUS on managers who show the behaviour characteristic of success.  
 BUILD optimism and confidence for managers to use their learning.  
 HELP managers see the programme as beneficial and important.  
 ALIGN manager and organisational values.  
 ENSURE managers are satisfied in, and committed to, their work and see it as meaningful.  
 ENSURE that participants have been equipped with the required knowledge and skills.

#### LEVEL 3

CHECK that managers are not under undue pressure and work-life conflict.  
 MAKE sure managers are in roles with minimal conflicting goals and priorities.

**ORGANISATION** – Characteristics of the organisational environment that support programme success

#### LEVEL 1

HAVE a supportive culture with open dialogue, mutual respect and recognition.  
 SHOW support and recognition of, and commitment to, health and safety.  
 DEMONSTRATE support for initiative.  
 BUILD a culture where employees are empowered.  
 ENSURE organisational policies and processes are accessible and helpful.  
 LET managers know what their role is.  
 SET clear standards and expectations for managers.  
 PROVIDE meaningful work for all.  
 ENSURE opportunities for development.  
 ENSURE peer, team and social support.  
 ENSURE HR and other stakeholders are capable of providing ongoing support.  
 ENSURE team members are empowered and equipped with relevant knowledge, skills and abilities.

#### LEVEL 2

GET senior managers to engage with others.  
 LEAD by example.  
 ENSURE managers focus on both task and people.  
 MAKE sure priorities don't conflict for managers.  
 ENCOURAGE good-quality team relationships.  
 BUILD cohesive working teams.  
 ENCOURAGE teams to trust in their manager.  
 CONSIDER if political/legislative influences could be used to raise programme priority.



# CIPD

Chartered Institute of Personnel and Development  
151 The Broadway London SW19 1JQ United Kingdom  
**T** +44 (0)20 8612 6200 **F** +44 (0)20 8612 6201  
**E** [cipd@cipd.co.uk](mailto:cipd@cipd.co.uk) **W** [cipd.co.uk](http://cipd.co.uk)

Incorporated by Royal Charter  
Registered as a charity in England and Wales (1079797) and Scotland (SC045154)  
Issued: February 2017 Reference: 7423 © CIPD 2017