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The Learned Disciplines of Management

How to Make the Right Things Happen

THE SUMMARY IN BRIEF

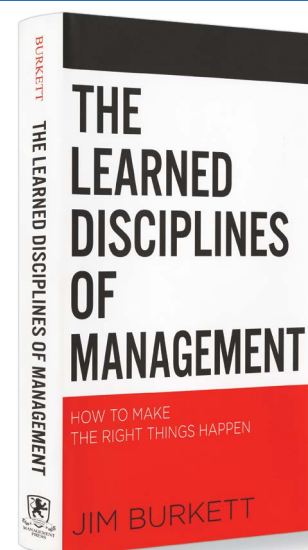
Jim Burkett knows something about making the right things happen. He has turned around 28 underperforming and troubled companies, from Fortune 500 companies to smaller public and private companies, throughout the United States, Canada and Europe. In *The Learned Disciplines of Management*, Burkett shares his accumulated insights and distills his management experience to give you a practical guide filled with scores of specific, real-life examples that show managers at all levels how to manage more effectively.

Burkett presents a coherent framework of individual disciplines that form a powerful, self-reinforcing management system for making the right things happen. They include planning, organizing, measuring performance, executing, following up, real-time reporting and problem solving. Each discipline is impactful, and all are indispensable. Their practice is the best way to understand what effective management does.

Ignore, misuse or neglect the learned disciplines of management, and you will not manage effectively. Fortunately, every one of the disciplines can be learned, and their practice will make you a more effective manager. *The Learned Disciplines of Management* is a definitive guide on management practice and is essential reading for anyone working to make the right things happen.

IN THIS SUMMARY, YOU WILL LEARN:

- The tools that will allow you to make the right things happen.
- Why the learned disciplines of management are not practiced effectively.
- How to enhance your management effectiveness.
- Why planning is a twofold discipline based on the right aims and the correct means.



by Jim Burkett

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THE COMPLETE SUMMARY: THE LEARNED DISCIPLINES OF MANAGEMENT

by Jim Burkett

The author: Jim Burkett is a turnaround specialist and president of Corporate Turnaround Consulting, Inc. During the past 35 years, he has turned around 28 underperforming and troubled companies, using his hands-on experience to transform management effectiveness through practicing the learned disciplines of management.

The Learned Disciplines of Management by Jim Burkett. Copyright © 2014 by Jim Burkett. Summarized by permission of the publisher Management Press, Inc. 220 pages, \$27.95, ISBN 978-0-9895170-0-3. To purchase this book go to www.amazon.com or www.bn.com. Summary copyright ©2014 by Soundview Executive Book Summaries® www.summary.com, 1-800-SUMMARY. For additional information on the author, go to www.summary.com.

Introduction

A manager's ability to make the right things happen is not an innate skill — no one is born a manager. Although management does require certain aptitudes, it also requires learning certain disciplines. The management disciplines function as tools that extend a manager's skill, allowing the manager to accomplish more than would have been possible without these tools.

Your tool kit may hold management techniques passed on by your predecessor or management methods given to you by your boss. But are they the right tools? Are they tools that make you effective — tools that allow you to make the right things happen? In other words, does your tool kit hold the seven learned disciplines of management? Your tool kit must include the following tools:

- **Planning:** Determines the right aims and the necessary means to achieve them.
- **Organizing:** Orders how activities are performed so as to maximize results and optimize resources.
- **Measuring performance:** Measures how well activities are performed, recognizing what gets measured, gets managed and gets done.
- **Executing:** Executes essential activities, ensuring that they are satisfactorily performed and completed.
- **Following up:** Ascertains and reinforces excellent performance outcomes through actionable feedback, activity alignment and employee accountability.
- **Real-time reporting:** Circulates real-time performance information throughout the organization to facilitate making the right things happen.
- **Problem solving:** Uses actionable feedback to identify, understand and solve problems.

These principles have been practiced, tested, refined and validated. Their skillful practice is the secret to your management effectiveness and success. ●

Planning

The first learned discipline of management is planning. Effective planning must answer two vital questions: What are the organization's aims, and what are the means for achieving them? A plan is a tool much like a construction blueprint. A blueprint depicts the project's aims and specifies the best means to obtain them. These elements make a plan executable; guiding, informing and directing management to a successful outcome.

Financially troubled companies often arrive at the wrong planned aims. This happens as management struggles to survive. When their plan fails, they try another. As they enact these changes in plans, compromises are made, and each plan becomes weaker, demanding less than the one before it. This process further deteriorates management effectiveness and the organization's performance, further imperiling the company's future.

The Right Aims

Effective planning requires management to establish the organization's right aims. This is management's only recourse, for until an organization is mobilized toward the right aims, its efforts are misdirected and its resources squandered.

Not only must the plan's aims be the right ones, but they also must be specific and measurable. Specificity requires that management rigorously arrive at the aim's precise details. Lack of specifics is one reason an organi-



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zation does not make progress in achieving its aims. Vague aims render a plan immeasurable, thus making it impracticable to manage. Measurability promotes manageability and is a critical consideration in arriving at a plan's aims (and means).

An effective plan lays the foundation for management success as it rightly establishes the organization's aims and correctly determines the means for achieving them, rendering both specific and measurable. ●

Organizing

The second learned discipline is organizing. Through its practice, the crucial connection between an organization's aims and the resources necessary to achieve them is reinforced.

Organizing does this in two ways. First, it makes certain that the required resources are available so that essential activities can be performed successfully. Second, activities are organized to ensure they use resources efficiently and effectively. When these two organizing aspects are carried out, the result is resources and results being maximized, which contributes to management making the right things happen.

Organizing is a time-consuming, deliberate and exacting process. Its jumping-off point is to recognize all the activities that must be performed to achieve the organization's aims. Once identified, these activities must be thoroughly understood. It is only after the activities have been identified and understood that management can evaluate whether the activities maximize resources and results. If it is determined that they do not, management acts to optimally organize them.

Carrying out these dictates can seem overwhelming at first. Fortunately, this process is best approached little by little, making it manageable.

Recognize the Activities

An organization's goals are achieved through its established means. These means, made up of various activities, must be performed successfully. Therefore, it is incumbent that management not only recognize what these activities are but break the activities down to identify the various steps, processes, procedures and resources that are required to successfully complete the activities.

Before the activities can be thoroughly understood and evaluated, they first must be recognized.

For example, if the organization's aim is to grow sales by 10 percent, then performing more sales calls would be a recognized activity. If the organization's aim is to eliminate

trade receivables over 60 days, then making phone calls on delinquent accounts would be a recognized activity. Each activity has various components that must be identified. Performing more sales calls entails selecting prospective customers, setting and carrying out sales call appointments, making sales proposals, processing customer orders, and determining if a salesperson has additional time available to perform these steps.

Often, recognizing the organization's activities is a straightforward process, but some situations make the process challenging. It's difficult to recognize an activity that is not being done but should be. Because an activity is not being done, it cannot be observed, thus making it difficult to recognize. Fortunately, the activity not being done produces consequences that can be observed, making recognizing the activity possible.

Evaluating Organization

Once all activities have been recognized and their various processes identified and thoroughly understood, you evaluate whether they are optimally organized. Evaluating how well an activity is organized guarantees that resources are ordered and coordinated so that the activity can be successfully performed, and ensures that employed resources are used effectively and efficiently.

In evaluating how well an activity is organized, it is helpful to simply ask *why* an activity is organized and performed the way it is. For instance, *why* isn't the activity done smarter, faster, better and cheaper? Asking "why" not only aids management in evaluating how an activity is organized and performed but also how it *should* be organized and performed.

An activity that is optimally organized maximizes results and resources. Conversely, a poorly organized activity diminishes results and resources. Thus, a poorly organized activity uses more resources while producing fewer results, whereas a well-organized activity uses fewer resources while producing more results. We see this in how cars are evaluated. A car that goes 40 miles on a gallon of gasoline is said to get good gas mileage (maximizes resources), whereas a car that goes seven miles on a gallon of gasoline is said to get poor gas mileage (minimizes resources).

Maximizing Resources

Maximizing resources (people, equipment, materials, supplies, etc.) is what effective management does. Thus, individual activities (and the interaction between integrated activities) are analyzed and evaluated to determine how effectively and efficiently they use resources.

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The discipline of organizing focuses on both the effective and efficient use of resources. For it is possible to use resources efficiently but to fail to effectively accomplish the activity's intended results. It is also possible for an activity to effectively accomplish its intended results but to do so inefficiently, wasting resources in the process.

Management measures, analyzes and evaluates how well each activity is organized using these two measures: effectiveness and efficiency. If an activity does not maximize results or resources, it gets reorganized. Keep in mind that during the process of organizing, it is crucial to favor the most valuable resources.

Effective organizing results in maximizing the resources an activity employs and the results it produces. When activities are thus optimally organized, they help achieve an organization's aims. ●

Measuring Performance

Measuring performance is essential to management making the right things happen. Its practice allows management to evaluate how activities *should* be organized and performed and to gauge how activities *are* organized and performed.

Measuring performance gives managers clear, immediate and objective feedback, indicating how effectively and efficiently an activity was performed. With this performance information, management recognizes when an activity is performed poorly so that the appropriate action can be taken to address the situation.

Here are three ways to measure performance:

1. **Time-based performance measures** establish the time (usually in minutes) it ideally takes to complete a given activity. For example, a time-based performance measure indicates the number of minutes it takes an employee to process a customer's order or the number of minutes it takes an employee to assemble a product.
2. **Outcome-based performance measures** establish the number of outcomes an activity ideally produces. This is often stated within a time context. For example, an outcome-based performance measure indicates the number of units (outcomes) a machine produces in an hour or the number of sales calls (outcomes) a salesperson performs in a day.
3. **Relational-based performance measures** show how two or more performance measures ideally relate, depicted as a ratio, quotient or some other relative, comparative amount. For example, the number of defective units produced in relation to the total number of units produced gives us a quality perfor-

mance ratio. The number of minutes it actually took to complete an activity compared to the number of minutes it should have taken gives us an efficiency performance ratio.

Why Measuring Performance is Not Practiced

Given performance measurement's inestimable benefits, you would think its practice was universal. But sadly that is not the case.

Perhaps the chief reason measuring performance is not practiced is because its distinct qualities go unrecognized and unappreciated. As a result, other methods such as accounting information, simple activity tallies, and industrial time and motion studies are commonly substituted. These are inadequate substitutes at best. Unlike these methods, measuring performance is designed to assess an activity's unique performance characteristics. This results in measured performance feedback that is clear, immediate and objective.

Another reason why measuring performance is not practiced is its perceived difficulty. The perceived difficulty of measuring performance is often not in deriving performance measures themselves. Rather, the perceived difficulty lies in overcoming the negative connotations that surround practicing measuring performance. Some common negative perceptions include

- Measuring performance treats people as cogs in a machine. It is a dehumanizing, callous practice.
- Management uses measuring performance as a heavy-handed method to extract more work from already overworked employees.
- Management measures performance because they mistrust their employees' motivation and intentions.
- It is not possible to accurately measure how well activities are performed.
- Measuring performance is a rigid and unrealistic management approach.
- Measuring performance against an ideal creates an unrealistic expectation.

Measuring performance is relentless; it constantly, quantifiably and qualitatively measures how activities are performed. It exposes individual performance, stripping away pretense, incompetence and complacency. It is no surprise that measuring performance can be threatening, as poorly performing employees and managers have no place to run or hide.

How to Measure Performance

The first step is to establish an ideal performance measure for every activity. Deriving an ideal performance measure is a simple process. It entails measuring an activity that is performed ideally (that is, using the best practices

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while not encountering any problems). This activity is measured (using time, outcome and relational measures) to derive an ideal performance measure. Ideal performance measures are the essential building blocks that management uses to gauge how effectively and efficiently an activity is performed.

As a general rule, the more timed observations the better. Not only does gathering more timed observations make the sample more accurate, but it also provides valuable insight into how the activity is and should be performed.

Sometimes taking accurate performance measurements is not possible. This is especially challenging when employees know their performance is being measured and are uncomfortable with or opposed to the practice. In these cases, it's necessary to ask for the department manager's help. This may require having the manager him or herself or a more willing and capable employee perform the activity so that accurate performance measures can be obtained.

Deriving performance measures is a process. The process obviously entails trying to get them right the first time. But another part of the process is to actually use the measures and, in doing so, validate them (or not). For credibility's sake, it is important to try and make them as accurate as possible. But when this does not happen, realize they are easy to correct later on in the process.

Once performance measures are in place, it is a good idea to make someone responsible for administering them. Existing measurements need to be maintained, validated and, if necessary, corrected. Also, activities change, requiring new measures to be derived. Administering performance measures is an ongoing effort. ●

Executing

Executing is management personified. Executing involves managers taking concrete action to make an organization's abstract aims a reality. Execution's concrete actions include making sure all the essential activities are satisfactorily performed and completed, engaging employees to ideally perform their assigned activities, and empowering employees to overcome the problems they encounter. The tangible results of effective executing are management making the right things happen.

Executing is not only an imperative management discipline; it is also a pivotal one. Planning, organizing and measuring performance lay the foundation for its practice. Executing in turn facilitates the practice of follow up, real-time reporting and problem solving.

Executing is simple in concept and demanding in practice. Conceptually, it entails carrying out all the activities that achieve the organization's aims. Its practice demands that the performance of these activities is not haphazard, but is methodically assigned to those responsible for performing them.

Consequently, executing is a meticulous nuts-and-bolts discipline. It achieves the organizations' aims by linking the desired outcomes to the activities that produce them. This makes executing certain, expectant and compelling. Executing is certain because it identifies and assigns specific activities to be completed. Executing is expectant because it expects all the activities to be performed perfectly. Executing is compelling because it holds accountable those who are responsible for performing the activities, insisting on excellent performance.

For some organizations, executing is not done because other inadequate means are used in its place. For example, management commonly uses communication as a means to execute its aims. In these organizations, managers believe that if they emphasize the organization's vision, mission and values, these oft-repeated qualities will work their way into how activities are performed. Still other organizations depend on an incomplete set of management disciplines, hoping these will enable managers to carry out the organization's aims.

There is no substitute for effective executing, which entails developing a checklist to identify and help carry out essential activities, properly assigning activities to the employees responsible for performing them, engaging employees to perform the assigned activities ideally, and empowering employees to deal with the problems that hinder their performance.

Developing a Checklist

Performing essential activities cannot be left to chance. Therefore, it is incumbent on management to guarantee that all essential activities will be satisfactorily performed and completed. To ensure that this is done, management develops a checklist.

Checklists are basic tools used to identify and help carry out activities. They run the gamut from simple checklists used for cooking (recipes) to complex checklists used to operate nuclear power plants (nuclear reactor checklists).

The checklist's purpose is to make certain that all essential activities will be carried out to insure that their execution is not random. Consequently, a checklist is used to choreograph performance. It links identified activities into being assigned and performed. For those performing the activities, a checklist informs, directs, reminds and records their efforts. For those managing the activities, a checklist records how

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the assigned activities have been performed, facilitating following up, real-time reporting and problem solving.

The developed checklist is used to facilitate the second aspect of executing: formally assigning specific activities to particular employees to perform. This is a crucial step, for when managers are unable or unwilling to make formal, specific work assignments to individual employees, the activity's performance outcome is uncertain and unpredictable. This is not effective executing but wishful thinking.

Instead, effective executing requires management to formally assign activities — that is, asking a particular employee to perform specific activities using a checklist that serves as an official record that the activities have been assigned and received.

Engaging and Empowering Employees

The third aspect of effective executing is management engaging employees to perform their activities ideally. Engagement recognizes the critical importance of communicating to employees how they are to perform their assigned activities. Through measuring performance, management has quantitatively and qualitatively established how each activity can be ideally performed. Now it is the manager's role to engage each employee to “try to get there.”

Obtaining ideal performance is not always easy or possible. Nevertheless, it is a manager's role to engage employees to make the effort, that is, to strive to perform their assigned activities ideally — perfectly.

Engaging employees has a galvanizing effect on performance. However, to sustain this effort requires that managers empower their employees because they will inevitably encounter problems when attempting to ideally perform their assigned activities. When problems are encountered, it will be necessary for the employee to take the initiative to address the problems so that hoped-for performance outcomes can be achieved.

Empowerment recognizes employees' intimate knowledge of the activities they perform. This gives them a unique opportunity to aptly respond to problems, one not afforded to management. Empowering employees to take appropriate action assumes many forms. It may mean solving the problem, moderating the problem, or involving others better suited to solve the problem.

Empowerment invites employees to take the initiative. It asks them to participate in addressing the problems that compromise their performance. This invitation implies treating employees as valued colleagues. It signifies management and employees working together to improve performance. As a result, empowered employees tackle problems, whereas apathetic employees accept them. ●

Following Up

Many managers stop at executing and consider their job finished. They assume the assigned activities will be satisfactorily performed and completed. This is not management but make-believe. Activities are not always satisfactorily carried out, nor are they properly completed. Consequently, management must effectively follow up on the assigned activities to ensure that the expected performance outcomes have been achieved.

As managers follow up, it produces four indispensable benefits. It creates actionable feedback; it aligns activities to produce expected results; it instills employee cooperation and fosters accountability; and it reinforces making the right things happen.

Create Actionable Feedback

Management follows up on assigned activities to ascertain how well the activities have been performed and to take action when performance is unsatisfactory. To rightly assess performance requires the manager to generate and collect actionable feedback (actionable feedback can also come from secondary sources such as reports and records). Actionable feedback is performance information that is accurate, reliable and timely; it is information that allows management to quantitatively and qualitatively assess performance and take the appropriate action to make the right things happen.

Not only does management thrive on actionable feedback, but employees do too. Employees crave real feedback — not the superficial, patronizing kind that passes for most interactions between manager and employee, but feedback that is reliable, accurate and timely.

This feedback is gathered in the immediacy of the moment when the work is being performed — not, as so often happens, when an employee's performance is evaluated every six to 12 months using the despised employee performance review.

Feedback is meaningful and fair when it is gathered throughout the workday, where it is immediately understood and instantly applied to the activities being performed. This timeliness enables the manager to approve good performance and correct bad performance. Correcting bad performance happens right away when problems are identified. Consequently, performance is enhanced when problems are not allowed to persist, worsen and spread but are decisively addressed in the immediacy of the moment.

Following up may reveal that the reason the expected results were not obtained is because the assigned activity was never completed. Or that it was not performed proficiently. Or that the assigned activity even when skillfully

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performed did not achieve the expected outcome, thus wasting resources. In these situations, following up gives management the chance to appropriately align activities to produce the expected performance outcomes.

Instill Cooperation and Foster Accountability

Following up instills and fosters employee and management cooperation and accountability. Employee cooperation is encouraged when manager and employee interact with each other when management frequently reviews and discusses how an employee performed. Management is a people-oriented profession requiring managers to work with and through people to make the right things happen. Following up establishes a platform where management can consistently interact with their employees, constructively supporting and encouraging the activities they carry out.

Practicalities of Following Up

In practice, follow up should flow like this:

- Generate and collect actionable feedback. Continue using the employee's activity checklist to calculate the employee's actual performance.
- When ideal performance has been achieved, the employee's performance is commended.
- When ideal performance has not been achieved, it prompts a conversation between employee and manager. This discussion generates more actionable feedback.
- Follow up should be done in two- to three-hour periods (when activities take longer to complete, this can be extended to four- or five-hour periods).
- Follow up sessions are intentionally brief, lasting no more than a few minutes.
- When communicating performance results, it is important to encourage employee cooperation.
- Reassure employees that the purpose of the session is not to manipulate, criticize and callously control an employee's performance but to constructively identify and address the problems that affect an employee's performance. ●

Real-Time Reporting

There is nothing like the sheer power of real-time reported feedback to scrub away layers of ignorance, inaction, incompetence, confusion, concealment and contradiction. Effective managers harness this power. Successful managers avoid relying on appearances. Instead, they use real-time reported performance information to discern reality, enabling them to take action on the things that are.

Authentic real-time reporting emerges through management follow-up. During follow-up, management generates and gathers actionable feedback that depicts how activities were performed. This reported feedback is real and timely. Its timeliness arises from being gathered in the moment when the activity is being performed and then promptly shared with employees and management. It is not reconstructed information put together after the fact. It is not historic information collected long after the activities have happened. It is not projected information, forecasting what might happen. Instead, real-time performance information is a few minutes to a few hours old.

There is an important distinction here: Real-time reporting is not accounting information. Accounting information was never intended to be used to manage performance. Accounting was originally practiced for financial planning and later for tax compliance. Accounting measures profits and losses, various costs, inventory turns, return on investment and so on. Although these are important financial determinants, they are inadequate for managing performance.

In addition, accounting information is historic information. It is a look back in time, usually the previous month's financial results. This monthly look back is fine for financial planning but ruinous for managing performance.

Six Features of Real-Time Reporting

Real-time reporting distributes performance information: This happens when management takes the collected performance information and effectively conveys it to those who can use it to make the right things happen.

Real-time reporting structures follow-up meetings: In these meetings, performance information is shared with the appropriate party through a daily performance summary and a weekly performance summary.

Real-time reporting perpetuates ideal performance: Real-time reporting makes ideal performance outcomes the organization's constant and inescapable focus. This focus impacts how activities are carried out as individuals and managers are given real-time performance information assessing whether they have achieved ideal performance. Over time, this focus eventually makes ideal performance routine.

Real-time reporting links the practice of the learned disciplines of management: These linkages safeguard the constant and consistent practice of the learned disciplines and result in management making the right things happen.

Real-time reporting identifies best practices: The ability to achieve ideal performance often indicates the

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absence of problems, but it can also indicate the use of best practices. Best practices produce the best performance outcomes. Once these are identified, the best practices can be replicated and broadly implemented to ideally carry out the assigned activities.

Real-time reporting facilitates problem solving:

Reported real-time performance information is evaluated to confirm whether a problem has been solved. Real-time reporting also provides feedback to determine if a solution may have caused other problems. ●

Problem Solving

Solving problems is not easy. The inherent underlying challenges in effective problem solving are first recognizing when problems occur and then identifying what they are.

This difficulty in recognizing and identifying problems is likened to a primordial swamp. Beneath a swamp's murky waters lie hidden obstacles and dangers. It is a haven for parasites and predators who exploit being unseen and unhindered.

To solve problems, management must first recognize and identify them. To do this, management must drain the swamp. The systematic practice of the learned disciplines of management drains the swamp. It gives management the capability to solve problems, enabling management to make the right things happen. After all, solving problems is what effective management does, enhancing their effectiveness and ensuring their success. Effective problem solving incorporates five essential practices:

- Recognize, identify and understand the problem.
- Determine if the problem is worth solving.
- Determine which problem solution to implement.
- Take action to solve the problem.
- Monitor if the problem has been solved.

Continually asking why a problem occurred results in a manager obtaining a deeper understanding of the problem. Once this is obtained, management is ready to determine if the problem is worth solving.

Not all problems are worth solving. This may sound strange, but ironically, there are solutions to problems that cost more than the problem itself. There are solutions that are more troublesome than the problem itself. Management must weigh if the problem's cost and consequences are compelling enough for management to try and find a solution.

If the problem is worth solving, then management must work to arrive at a solution worth implementing. Often, more than one solution is found. Each solution's costs and benefits are scrutinized to decide which solution most compellingly solves the problem, thus triggering management action to implement it.

Take Action to Solve the Problem

Taking action has six salient phases: it specifically identifies what actions are to be taken; it measures the actions; the actions are translated into executable steps; the steps are assigned to be implemented; those assigned have a specific deadline to complete them; and the deadlines are followed up on to confirm they are completed when due.

Confirming that the problem has been solved also requires monitoring to ensure that the right action was taken. Sometimes there are unintended consequences. Sometimes the solution unexpectedly costs more than anticipated. Sometimes the "solution" does not work. Through constant monitoring, these possible outcomes are recognized and acted on.

Problem solving is the learned disciplines of management's apex. Its practice complements them by eliminating the wrong things from happening. It completes them by making the right things happen. As it does so, it fulfills management's aims and ensures their success.

When practiced both individually and collectively, the seven learned disciplines of management form a coherent management system that effectively transforms a company's management team that is struggling to make the right things happen. ●

RECOMMENDED READING LIST

If you liked *The Learned Disciplines of Management*, you'll also like:

1. ***Managing* by Henry Mintzberg.** Mintzberg writes about what managers do, how they do it, and how they can do it better.
2. ***The Invisible Spotlight* by Doug Katz and Craig Wasserman.** The authors share stories about management successes and misadventures that offer a practical perspective on building sound management relationships.
3. ***What Matters Now* by Gary Hamel.** Hamel rethinks the fundamental assumptions we have about management, the meaning of work and organizational life.