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INTRODUCTION

Scientists and managers devote considerable attention to improving the planning of innovation and investment activities (IIA) at the enterprise level. A sufficient number of publications [3; 4; 6; 11; 18], textbooks [4; 7; 9; 11], regulatory acts [12; 19; 24], and instructional materials [21; 23] have been produced on this subject. These sources examine in detail the theory, methodology, and practice of developing strategic plans and forecasts; preparing plans for the production of innovative products, sales, and logistics; forming financial plans; establishing managerial, accounting, and tax systems within an enterprise; carrying out structural transformations; implementing IIA; developing business plans; and conducting procedures for the selection, training, retraining, and placement of personnel.

Significantly less attention is devoted to the theory and methodology of personal planning of IIA by the managers themselves. Executives and specialists often carry out activities associated with managing the innovative-investment development (IID) of an enterprise guided primarily by common sense, personal experience, habits, and the most general regulatory documents—staffing schedules, job descriptions, departmental regulations, the enterprise’s working regime, orders and directives issued by higher-level management, and other normative acts. In other words, at most enterprises, personal planning and the IIA of managers and specialists are implemented in a mode of undefined self-management. Existing general corporate regulations are often formal in nature and are not actually used in day-to-day work. Under such conditions, the effectiveness of managers and specialists becomes a matter of chance rather than a consistent pattern. The efficiency of undefined self-management depends largely on the personal qualities of managers and specialists, such as the ability to comprehend corporate goals; the skill to identify priorities and determine the sequence of personal tasks; a proclivity for teamwork; personal discipline and organization, among others. Not all enterprises have managers and specialists who possess these qualities.

Many enterprises incur significant losses due to the absence of technologies for personal planning of IIA by managers and specialists.

First, unproductive losses of working time for this category of employees often reach 40% or more. Second—and this is the most important—in everyday activities, the priorities of IID are neither defined nor observed, although priority-setting is the key distinguishing feature of an effective manager.

Third, the goals of the enterprise and those of its employees frequently come into conflict under conditions of undefined self-management; in other words, a systematic translation of enterprise-wide goals across all management levels is not ensured. Fourth, synchronization and harmonization of work performed by various managers and specialists is disrupted (some are overloaded, others underloaded; some advance too quickly, others lag behind), and as a result, large tasks are completed at the speed of the slowest link in the production chain.

Fifth, important managerial decisions are made hastily (for this reason, according to research findings, up to 70% of decisions in some companies are erroneous or suboptimal).

These losses can be avoided if the enterprise implements a managerial technology within which formalized procedures for personal planning of IIA for managers and specialists are carried out with pendulum-like regularity. It is essential to implement precisely a technology of IIA planning. As is well known from the experience of organizing any activity, only a technology makes it possible to synchronize and harmonize separate stages, procedures, and operations of a given process. It enables controlling the process. It allows abandoning the notion that “management is an art” or “management is a craft” in favor of the idea that management is a standardized, regulated process.

This, in turn, allows avoiding dependence on the personal qualities and whims of individual performers, as well as other deficiencies and losses associated with undefined self-management.

The widespread application of personal planning technologies for the activities of managers and specialists at domestic enterprises

is constrained by the insufficient development of the scientific foundations of management technologization in general, and of the methodology for designing and implementing technologies of personal planning of IID at enterprises, in particular. This monograph is aimed at developing these scientific and methodological issues, which determines its relevance.

The present study is based on three key concepts: (1) "management;" (2) "managerial technology;" and (3) "personal planning of IIA." Therefore, in our opinion, the degree of development of this problem should be examined from three perspectives: (a) assessing the current state of management science (viewing the problem from the standpoint of methodology); (b) assessing the degree of development of the theoretical and methodological foundations of the technologization of managerial activity (viewing the problem from the standpoint of specific research); (c) assessing the existing theories and methods of personal planning and accounting of the activities of managers and specialists of an enterprise (viewing the problem from the standpoint of practice).

The scientific aspects of improving enterprise management are examined by many authors. Among them are numerous foreign specialists: Ackoff A., Ouchi W., Peters T., Waterman R., Robbins S., Conner D., Deming E., Fulmer W., Kotter J. P., O'Toole J., Pasmore W., and others. A significant contribution to the theory and practice of IID management has been made by domestic scholars: Burkynskiy B., Nekrasova L., Prodius I., Filyppova S.

An analysis of the works of the aforementioned (and other) authors suggests that management science is still in a formative stage. Within this discipline, several alternative sets of theoretical and methodological views exist concerning the nature of the phenomena under study and the methods for solving existing problems. A unified theory of management simply does not exist. The view that it is generally impossible to develop a normative theory in the field of management one that would reliably explain the processes occurring in this domain or serve as a universal tool for solving problems (as is done in mathematics, physics,

and other natural sciences) appears well grounded. Such, evidently, is the nature of management as a type of human activity. This creates certain difficulties in the study of problems related to improving enterprise management. At the outset of their work, each researcher is compelled to construct, from the multitude of existing views and concepts, a set of principles, rules, and propositions within which research tasks can be effectively addressed. It also becomes necessary to refine the terminology applied by the researcher.

Technologization of managerial innovative-investment activity (IIA).

The role of technology is extremely significant across all spheres of human activity. The essence of technology lies in the principle of decomposing any activity into its constituent elements. On the one hand, such decomposition makes it possible to substantially increase the efficiency of performing individual procedures, operations, and stages. On the other hand, the deliberate design and implementation of a rational sequence of stages, procedures, and operations produces a systemic effect enhancing the productivity of human activity. Furthermore, technologies serve as intermediaries between science and practice (scientific knowledge is transmitted into the economic and innovation spheres through technologies), facilitate the dissemination of best practices, and promote the specialization of human activity and labor productivity.

In earlier times, the term "technology" was applied almost exclusively to technical (industrial, construction, manufacturing) processes. In recent years, however, terms such as "political technology," "innovation technology," "information technology," "business technology," "planning technology," and "management technology" have emerged and become widespread. In all these areas, the application of the technological principle - dividing activity into component elements has produced substantial benefits.

Theoretical and methodological foundations for the use of technologies in various types of managerial and innovative-investment activity are covered in the works of the following authors: Merkulov M., Fedulova L., Shypulina Yu., Yermak S., Davenport T., Enos J. L., Stephen H., and others.

It should be noted that in many publications, the concept of “technology” is understood primarily in an everyday sense. The theoretical and methodological views of the listed authors are contradictory, incomplete, and excessively abstract.

For their application in practical developments, it is first necessary to clarify the essence of managerial technologies, classify their types, identify the properties of different types of technologies, as well as the specifics of their design and implementation.

Issues of personal planning and accounting of the activities of managers and specialists are addressed in the works of the following researchers: Dubnytskyi V., Kuzmin O., Blanchard K., Johnson S., Cooper A. M., Trammell D., Davidson J., Douglass M., Douglass D., Mayer J., Moskowicz R., Silber L. T., Taylor H. L., and others.

Existing theories and methodologies of personal planning in innovative-investment activity can be regarded as incomplete and unsystematic. For example, the methodology of calendar planning (using Gantt charts or network planning and control methods) is not universal. It is oriented toward project management, which occupies a limited place in the overall managerial work at an enterprise.

The widely known concept of Time Management is essentially a methodology of self-management. The Time Management system can be viewed as a set of skills for personal management of one’s own time. In other words, the ability to plan, track, and analyze one’s time using the Time Management system is simply one of the manager’s professional skills just like the ability to write an order, conduct a meeting, or work with a computer.

Therefore, without significant adaptation, the Time Management concept cannot serve as a methodological foundation for corporate personal planning of innovative-investment activity for managers and specialists. Moreover, many domestic managers and specialists do not possess Time Management methods.

The above considerations determine the relevance of developing methodological approaches to the design and implementation of effective technologies for personal planning and accounting of the activities of managers and specialists of an enterprise. This, in turn, defines the topic of the present monograph.

In this context, the primary objective of the monograph is to investigate the organizational and economic problems of management technologization at the level of an industrial enterprise, to develop methods and technologies for the personal planning of innovative-investment development (IID) by managers and specialists, and to implement the developed methods and technologies of personal planning of innovative-investment activity (IIA) using the example of a specific enterprise.

The formulated objective necessitates solving a number of tasks, the main of which include:

1. Clarifying the essence of managerial technologies at an industrial enterprise and their role in improving the efficiency of IIA management.

2. Developing a classification of types of managerial technologies for IIA and identifying their properties within the defined types.

3. Determining the goals, tasks, and methods of personal planning for the activities of managers and specialists of the enterprise.

4. Developing a methodology for the self-management of managers and specialists using the principles of the Time Management system.

5. Designing and implementing a technology of personal planning and accounting for the activities of managers and specialists under the conditions of an operating enterprise (using JSC "Odeskabel" as an example).

The monographic research is based on the systemic principle of analyzing management processes at the enterprise level. Through comparative and cause-effect analysis, the essence and various types of managerial technologies were examined in relation to the tasks of personal planning of IIA by managers and specialists. At certain stages of the monograph, methods such as mathematical modeling, systems design, brainstorming, survey questionnaires, problem-oriented meetings, expert sessions, and business games were applied.

The theoretical foundations of the study were formed using the scientific works and developments of domestic and foreign specialists in management theory. The authors made use

of the works of Drucker P., Blank I., Kuznetsov E., Mazaraki A., as well as the results of the authors' examination of practical experience in improving technologies for personal planning of the activities of managers and specialists at enterprises in southern Ukraine.

The information base of the monographic study consists of regulatory and legislative acts, the results of domestic statistical studies and sociological surveys, materials from periodical publications, scientific articles and dissertations, conference proceedings, Internet resources, as well as data on the activities of domestic and foreign enterprises.

Within this publication:

1. The essence of managerial technologies and their role in enterprise management has been defined.

2. A classification of managerial technology types has been developed, and their properties have been identified by category.

3. The goals, tasks, and technologies of personal planning of IIA for managers and specialists have been determined.

4. A methodology of self-management for managers and specialists of the enterprise, based on the principles of the Time Management system, has been proposed.

5. Using the example of a specific enterprise, the effectiveness of the proposed technology of personal planning of IIA for managers and specialists has been demonstrated.

The practical significance of the obtained results lies in the fact that the proposed theoretical and practical material may be used to initiate work at industrial enterprises on the design and implementation of a technology for personal planning of IIA for managers and specialists.

The application of the proposed self-management methodology for managers and specialists based on the ideas of the Time Management system will enable enterprises to increase the productivity and quality of managerial labor through the proper selection of priorities and improvements in managerial decision-making processes. The formulated recommendations for solving specific tasks related to the implementation of managerial

technologies may be applied at an industrial enterprise once these technologies are adapted to its specific operating conditions.

The provisions developed in the monograph on the analysis and design of managerial technologies, as well as the methods for developing and implementing a technology for personal planning of IIA for managers and specialists, may form the basis of university courses for training economists and managers, as well as business education programs.

The preparation and publication of this monograph were carried out as part of research at Odesa National Polytechnic University on the topic (R&D) "Management of Integrated High-Tech Production for the Manufacture of Innovative Products for the Needs of Ukraine's Defense Capability and Sustainable Development" (No. 0125U001609) with the support of the Ministry of Education and Science of Ukraine.

The managerial technology tools presented in this work were used in consulting projects (some results are cited in [6]) and in teaching the course "Strategic Management of Enterprise Innovative Development" at the Institute of Economics and Management of Odesa Polytechnic University.