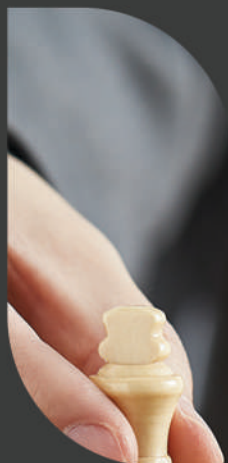
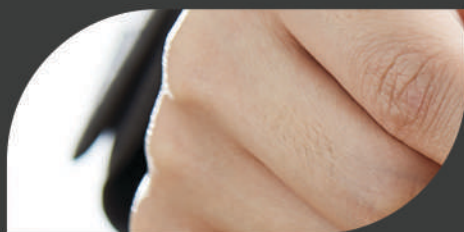


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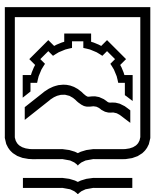


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2024

**THE ENGLISH LANGUAGE FOCUSED
ON STRATEGIC MANAGEMENT**

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**The English Language Focused
on Strategic Management**

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INTRODUCTION

In a highly competitive business environment, it is essential for organizations to have a solid strategic direction that will enable them to achieve their objectives. The strategic process and strategic management will become key tools to achieve this. From the generalities of strategic management to the design and implementation of effective strategies, this set of concepts covers a broad spectrum.

Strategic management and strategic direction are fundamental to driving success in any modern enterprise. These two aspects complement each other by providing a comprehensive view on how to run efficient operations while pursuing clear objectives. In this dynamic, management plays a vital role, whose tasks and functions are strongly linked to the planning and execution of strategic actions.

An essential component within the business environment is to understand both the business and its objectives. SMART (Specific, Measurable, Achievable, Relevant and Time-bound) objectives provide clear guidance for setting realistic goals that drive tangible results. In addition, we cannot overlook the importance of business ethics and leadership in changing times; these values are fundamental pillars for building strong relationships with customers and employees.

Strategy development and implementation requires specialized attention to internal and external factors that can influence an organization's success. Identifying internal forces, such as the company's own resources and capabilities, as well as external forces, such as the competitive environment and market trends, allows to seize opportunities and face challenges effectively.

Analytical tools such as the internal factors assessment matrix (IFAM) and the SWOT (strengths, weaknesses, opportunities, threats and opportunities) matrix, also known as the SWOT matrix, are used to formulate sound strategies. These matrices help assess the internal and external impact on the organization to make more informed decisions.

Finally, measuring performance is crucial to evaluate progress toward the established objectives. Key indicators will be useful to monitor results and identify areas where continuous improvement is required. By means of real case studies, it can be seen how these concepts find direct application in different business contexts related to marketing.

CHAPTER I

THE STRATEGIC PROCESS AND STRATEGIC MANAGEMENT

1.1 GENERALITIES OF STRATEGIC MANAGEMENT

Author definitions

To Ahmed, (2012) strategic management is a process composed of the complete set of commitments, decisions and actions that a company requires to achieve strategic competitiveness and obtain above-average performance. In this process, the first step of the company is to analyze both its external and internal environment to determine what its resources, capabilities and core competencies are; that is, the sources of “strategic inputs.”

To Torres Hernandez, (2015) the generalities of strategic management are generated through the selection and relationship of facts, as well as the formulation and use of assumptions (premises) regarding the future in the visualization and formulation of the proposed activities that are believed to be necessary to achieve the desired results.

According to Keller, (2008) Strategic management is a process of systematic evaluation of a business and defines long-term objectives, identifies goals and objectives, develops strategies to achieve these and allocates resources to achieve them. It is a powerful diagnostic, analysis, and decision-making tool that allows organizations to face the challenges of the environment and adapt to changes with a systematic effort aimed at achieving greater efficiency and quality.

To Porter, (2006) it is the process of structuring and using sets of resources oriented towards the achievement of goals, to carry out tasks in an organizational environment.

According to Baldwin, (2010) administering an activity (in our case: a company or an institution) means directing it, leading it, or, in other words, governing the course of its operation. Every business, from one made up of the economic operations of a single person to vast transnational corporations, needs

to be managed in order to direct and integrate all of its components. These components are the people, the team, the practices and techniques applied, as well as the financial aspects, all of which must be coordinated by an administrator or executive.

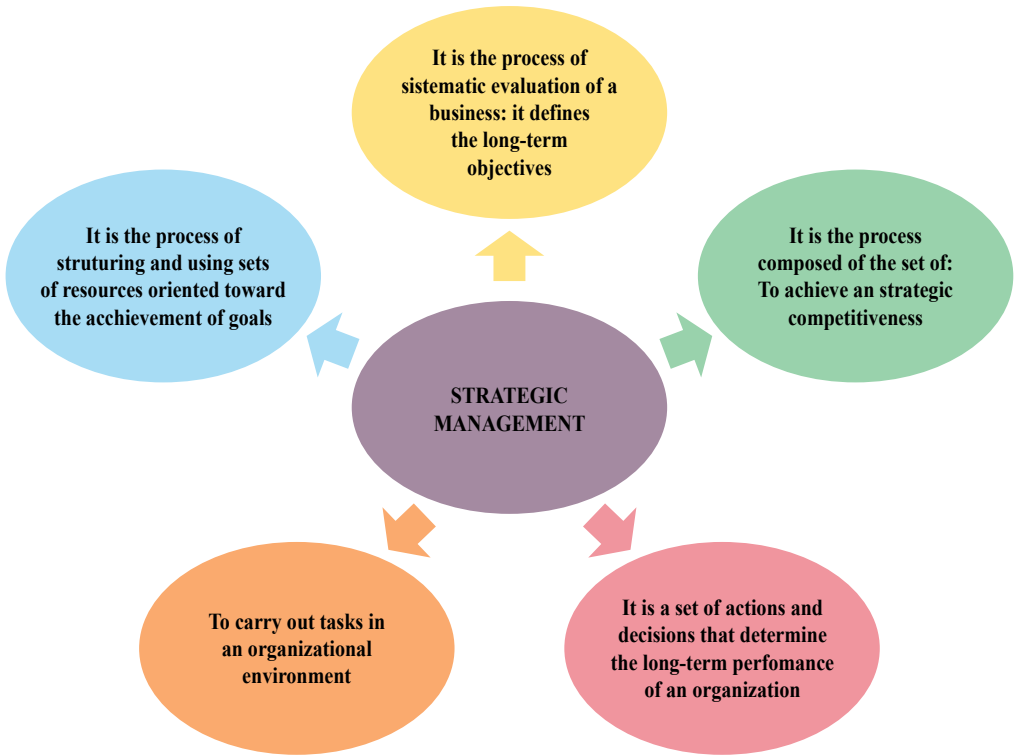
According to the authors, strategic management is essential for any organization because it has a clear direction, an informed analysis of the business environment, decision making based on reliable data and the ability to adapt to constant change. In addition, it promotes effective internal coordination and helps evaluate the achievement of established strategic objectives, while striving to maintain a sustainable competitive advantage in the marketplace.

In conclusion, it can be stated that:

1. Strategic management is a process in which a series of actions are designed where the internal and external environments of a company are analyzed in order to take advantage of the competitive advantages that they possess or in turn protect themselves from the threats that exist in the environment. of the company all this in order to meet the proposed objectives.
2. It is the combination of the activities that every organization carries out and the means that it is using to reach them.
3. It is a set of actions and decisions that determine the long-term performance of an organization which is made up of strategy formulation (strategic or long-term planning), implementation of the strategy, as well as its evaluation and control.

Graphic organizers:

Strategic management: circular diagram, divided into different concepts.



Prepared by: The authors

Generalities of strategic management: circular diagram, detailed.



Prepared by: The authors

Solved Questionnaire

1.- What is strategic management according to Keller, (2008)?

Strategic management is a process of systematically evaluating a business and defining long-term objectives, identifying goals and objectives, developing strategies, and allocating resources to achieve them.

2.- What is the objective of strategic management?

The Strategic Administration has as a general objective, to conceive the current need of developing an organizational strategy, as part of the administrative work tending towards the achievement of the greatest effectiveness in the fulfillment of the organizational objectives and with the support of the functional areas.

3.- Write at least 3 benefits of strategic management?

It allows to detect opportunities, classify them by priority and exploit them.

It offers an objective view of administrative problems.

It represents a framework to better coordinate and control activities.

Reduces the consequences of adverse changes.

It allows the improvement of resource allocation.

It decreases the amount of time and resources spent on correcting wrong decisions.

It constitutes a framework for internal communication.

It helps incorporate the behavior of individuals into the total effort.

It provides a basis for delineating individual responsibilities.

Encourages reasoning.

Offers a cooperative approach.

Promotes a positive attitude towards changes.

Provides discipline and formality to the administration of the business.

4.- What is business strategic management according to your criteria?

Strategic management is the art and science of formulating, implementing and evaluating decisions of different functionalities that will allow organizations to achieve their objectives.

5.- What are the strategic levels?

1.- The strategic or institutional. - are shareholders, directors and senior executives.

2.- The intermediate level. - It is made up of all the people who are between the strategic level and the operational level (middle managers, finance, production, etc.).

3.-Operational level. - It is the lower level of the company, where the operations or tasks are executed (workers).

6.- What is PEST analysis?

The PEST analysis identifies the factors of the general environment that are going to affect the companies. The term comes from the English acronym for “Political, Economic, Social and Technological”.

7.- Define some elements of the pest analysis.

Political - legal: Factors related to the legislative regulation of a government.

Economic: Factors of an economic nature that affect the market as a whole

Technological: State of technological development and its contributions to business activity.

8.-Weber’s bureaucratic system is based on the following principles:

1. In a bureaucracy, a boss’s formal authority derives from his or her position and hierarchy in the organization.

2. People should fill positions based on their performance, not because of their place in society or because of their personal relationships.

3. Authority is effectively exercised in an organization when positions are hierarchically ordered.

4. Managers must create a well-defined system of rules, procedures, and standards, so that they can control behavior in the organization.

9.- From Henri Fayol identify the essential principles to increase the efficiency of the administrative process:

1. Division of labor.

2. Authority and Responsibility. Managers have the right to give orders and

the power to demand obedience from their subordinates.

3. Unity of command. An employee should receive orders from only one superior.

4. Line of command. The length of the chain of authority should be limited.

10.- Main managerial functions:

The four main managerial functions are: planning, organizing, directing and controlling.

1.2 STRATEGIC MANAGEMENT PROCESS

Authors Definition

- **According to Porters, (2002)** The strategic management process is more than a set of rules to follow. It is a philosophical approach to business. Senior management must first think strategically, then apply that thinking to a process. The process is best implemented when everyone within the business understands the strategy. The five stages of the process are: goal or objective setting, analysis, strategy formation, strategy implementation, and strategy monitoring.
- **According to Gonzalez, (2015)** The phases that integrate strategic management in its process are the following.
 1. Understanding and definition of the business.
 2. Mission determination.
 3. Define the vision or strategic intent.
 4. Determine the values or codes of ethics.
 5. Locate the strategies and their formulation.

In the development of the phases of the strategic process, everything necessary must be investigated so that its definition contains the theoretical and practical essence of the company.

When formulating these phases, it is convenient for all the members of the

company to participate and generate ideas according to their levels of responsibility, so that the result represents a real motivation and assessment for all the human resources of the organization.

The final decision of the strategic process will be made by the first hierarchical level of the company, that is, the top management, connecting ideas and defining what encompasses the entire organization and is the best for a motivating start to the strategic process.

- **According to Torres, (2013)** The strategic management process can be broken down into five different components, which are:
 1. Selection of the Mission and the main corporate goals.
 2. Analysis of the organization's external competitive environment to identify opportunities and threats;
 3. Analysis of the internal operating environment to identify strengths and weaknesses of the organization;
 4. Selection of strategies based on the strengths of the organization and that correct its weaknesses, in order to take advantage of external opportunities and counteract external threats;
 5. Implementation of the strategies.
- **According to Certo, (2005)** are identified as the main stages inherent in the delineation of the strategic management process model, such as:
 1. Identification of the organization's current mission, objectives and strategies

Every organization needs a mission that defines its purpose and answers the question: What is our reason for being in business? Defining the organization's mission forces management to carefully identify the scope of its products or services. These statements provide clues as to what is the *raison d'être* of these organizations. When a company fails to define its purpose and the scope of that purpose, the results can be disastrous. Determining the purpose or reason for a business is as important to nonprofits as it is to for-profits.

2. Analysis of the external environment

Managers in every organization need to analyze their environment. They need to know, for example, what the competition is doing, what legislation could affect the organization, and what the availability of labor is in the locations where it operates.

3. Identification of opportunities and threats

After analyzing the environment, management needs to assess what it has learned in terms of opportunities the organization can exploit and threats it must face. Opportunities are positive external environmental factors, whereas threats are negative.

4. Analysis of the organization's resources

After looking at the outside of the organization, let's now look at its inside. This consists of evaluating, for example, the skills and abilities of the organization's employees; what is the company's cash flow; how consumers perceive the organization and the quality of its products or services, etc.

5. Identification of strengths and weaknesses

The analysis of the preceding point should lead to a clear evaluation of the organization's internal resources. It should also indicate the capabilities of the organization to perform different functional activities. Any activities that the organization does well or any resources that it has are known as strengths. Weaknesses are activities that the organization does not perform well or resources that it needs but does not have.

6. Formulation of strategies

Strategies need to be established at the corporate, business, and functional levels. The formulation of these strategies comes after the decision-making process, this step is completed when the management has developed a series of strategies that will give the organization a competitive advantage. That is, management will also seek to position the organization so that it can gain a relative advantage over its rivals.

7. Implementation of strategies

The penultimate step in the strategic management process is implementation. A strategy is only as good as its implementation. No matter how effectively a company has planned its strategies, it cannot be successful if the strategies are not implemented properly.

8. Evaluation of results

The final step in the strategic management process is the evaluation of results. It consists of evaluating how effective our strategies have been, and examining what adjustments need to be made.

- According to Towers, (2015) **currently**, the terms strategic planning, and global management are used as synonyms. Although each concept treats and contains the same thing, at the moment of analyzing them some peculiarities are found that are rather due to the evolution of the term. In the previous definitions there is agreement that planning is a process; that is, a series of phases or stages that are carried out in sequence and that are integrated by concepts such as:
- Diagnosis (description of the external and internal environment)
- Vision-mission
- Objectives
- Strategies
- Budget
- Evaluation of results
- Feedback

In short, according to the authors, the strategic management process is very important because it provides clear guidance on the organization's objectives and how to achieve them. It promotes adaptability, efficient use of resources and facilitates effective internal coordination. By following this process correctly, organizations can achieve their long-term strategic objectives and become stronger

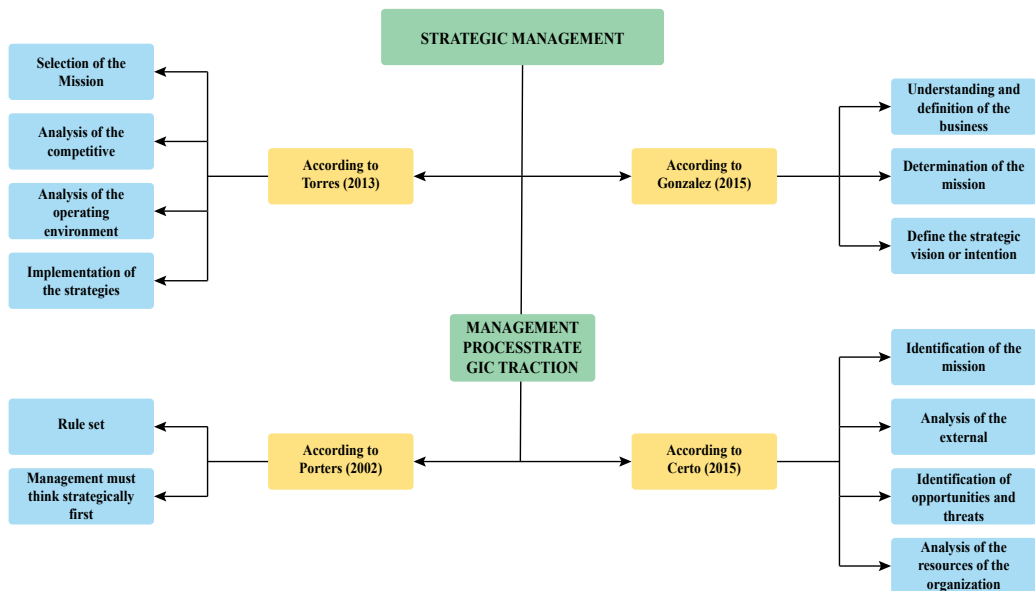
in the changing business environment.

In conclusion:

- Strategic management is a process of systematically evaluating a business and defining long-term objectives, identifying goals and objectives, developing strategies to achieve them, and allocating resources to realize them.
- Strategic management is a process that evaluates, defines, and carries out the strategies of a business, company or organization. That is to say, it is in charge of defining the goals, the short and long-term objectives, the vision and mission, and the strategies to be implemented.
- It is a powerful tool for diagnosis, analysis, reflection and collective decision-making, regarding what to do now and the path that organizations and institutions must follow in the future, to adapt to the changes and demands imposed on them by the environment and achieve maximum efficiency and quality of its services.

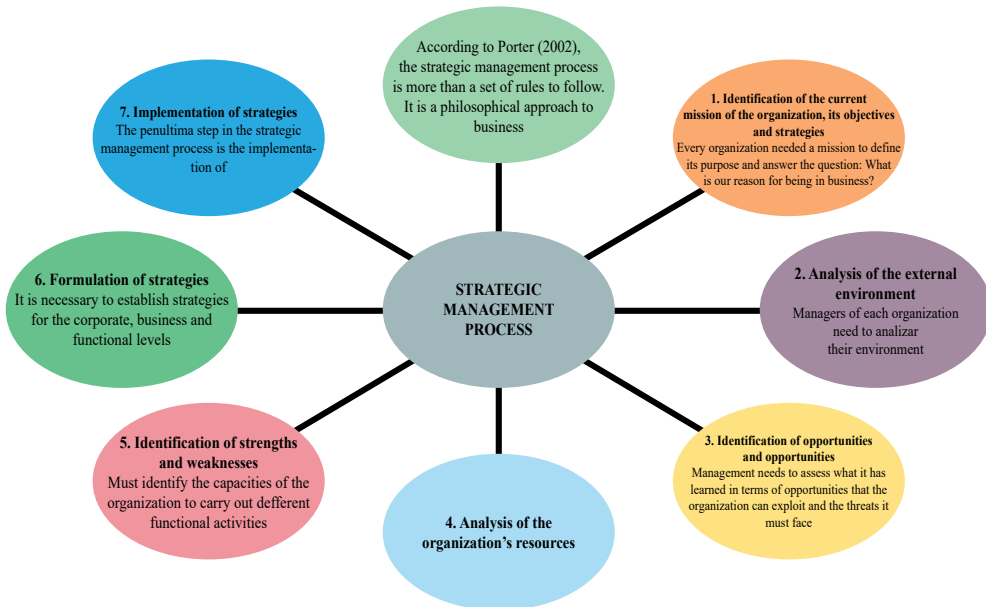
Graphic organizers:

Strategic management processes: conceptual diagram, definitions.



Prepared by: The authors

Strategic management processes: circular, conceptual and procedural diagram of identification, analysis, formulation and implementation.



Prepared by: The authors

Solved Questionnaire

1. Why do you think business strategy is important?

Business strategy at the business level is important because it allows you to design an action plan in any area to achieve your goals.

2. What do you think a leader must have to implement a business strategy?

He or (the) leader works with other people, so no business strategy will come to fruition if people don't work together.

3. When do you think a business strategy is successful?

Unfortunately, there is no 'magic formula' to know when a business strategy is successful. This can only be seen while developing them or once it is being measured.

4. When do you think is the best time to do the strategic planning of the company?

There is no established date that fits all companies to carry out their planning, some companies follow the accounting year, others do it in a calmer period, where they do not have a great sales peak. The best time will vary depending on your business model.

5. What are the sales of strategic planning?

Without well-defined strategic planning, it can be seen that companies do not know which direction to take, much less their managers and employees. The areas can make tactical plans disconnected from each other and the objectives of the organization will never be met.

6. What is our reason for being in business? Respond to the following strategic management process

- a) Identification of the current mission of the organization, its objectives and strategies
- b) Analysis of the external environment
- c) Identification of opportunities and threats
- d) Analysis of organization resources

7. When we talk about the basic restriction on the actions of a manager, knowing what the competition does, what legislation could affect the organization and what is the availability of labor in the locations where it operates, we refer to the following strategic management process

Strategy Formulation

Implementation of strategies

Evaluation of results

Analysis of the external environment

8. According to Porter, (2002) the five stages of the strategic management process are:

- a) Goal or objective setting, analysis, strategy formation, strategy implementation, and strategy monitoring.

- b) Goal or objective setting, analysis, strategy formation, strategy implementation, and determining values or codes of ethics
 - c) The setting of goals or objectives, analysis of the competitive environment, analysis of the operating environment, the implementation of strategies and determining the values or codes of ethics
 - d) Goal or objective setting, analysis, strategy formation, strategy implementation, and feedback.
- 9. It is the process of strategic management in which competitive advantages allow the organization to better capitalize on its strengths and opportunities in the environment.**
- a) Strategy Formulation
 - b) Implementation of strategies
 - c) Analysis of organization resources
 - d) Evaluation of results
- 10. According to Gonzales, (2015) the final decision of the strategic process will be made by the first hierarchical level of the company, that is:**
- a) The high direction
 - b) The operating level
 - c) Executive level
 - d) Coordinators

1.3 STRATEGIC PLANNING IN THE ADMINISTRATIVE PROCESS

Authors Definition

Torres Hernández Z, (2015) mentions that it is the process of creating strategies and putting them into practice. Refers to the managerial process of creating

a strategic vision, setting goals, and forming a strategy, as well as implementing and executing that strategy, and then, over time, initiating any corrective adjustments to the vision, goals, strategy, or execution that seem suitable.

Michael Hitt, (2006) mentions that the process of strategic management is the set of commitments, decisions and acts that a company needs to carry out to achieve strategic competitiveness and obtain above-average profits. In the scheme of these authors three stages are distinguished where strategic planning, direction and strategic administration usually refer to the same process:

- Of strategic information.
- Of strategic measures.
- Results of the strategies.

To Henry Fayol, it is called administrative process, because within the organizations a series of important activities are systematized for the achievement of objectives: in the first place, these are set, then the necessary resources are delimited, the activities are coordinated and finally the fulfillment of the objectives is verified.

Luna González, a. C. (2015), mentions that the administrative process is the set of successive stages or phases through which the administration is carried out. These are interrelated and form an integral process, in addition, the administrative process is the basis of the administration for this reason various classification criteria of relevant writers on the function of the administration.

To Fernández Romero, (2004) strategic planning indicates the actions to be undertaken to achieve the goals, taking into account the relative competitive position, the forecasts and hypotheses about the future. Programs and action plans tell us what needs to be done, by whom, when, and with what resources. The information systems (ex ante, ex post and in via) constitute the basis for monitoring compliance with the plan.

To Navajo, (2016) Strategic planning “is a powerful tool for diagnosis, analysis, reflection, and collective decision-making regarding current activities and the path that communities, organizations, and institutions must take in the future. Not only to respond to the changes and demands that the environment imposes on them and thus achieve maximum efficiency and quality of their interventions, but also to propose and specify the transformations that the environment requires”.

According to the authors, strategic planning is an integral part of the management process that establishes clear objectives, analyzes the business environment, identifies strategic opportunities, implements necessary changes and continually evaluates progress toward achieving objectives. It provides direction, improves decision making and promotes effective coordination in all functional areas of the organization.

1.4 ADMINISTRATIVE PROCESS

Managers are responsible for planning, organizing, and directing actions within organizations. To do this, they carry out four basic functions that make up what we know as the “Administrative Process.” Henry Fayol was the author who determined the four vital functions in the administration, under the belief of the need to systematize the tasks of a company. His contribution to the discipline is important to this day. It is called administrative process because within organizations a series of important activities are systematized for the achievement of objectives: first, these are set, then the necessary resources are delimited, activities are coordinated and finally compliance with the objectives is verified.

To the author George Terry, each of them implies:

1. Planning: consists in determining the objectives and courses of action; it determines:
 - The goals of the organization.
 - The best strategies to achieve objectives.
 - Strategies to reach set goals.
2. Organization: consists of distributing the work among the group, to establish and recognize the necessary relationships and authority, it implies.
 - The design of tasks and positions
 - Appoint the right people to fill the positions.
 - The structure of the organization.
 - The methods and procedures to be used.
3. Direction: consists of directing the talent and effort of others to achieve the

expected results, it implies:

- Determine how people's talent will be directed.
 - Determine the appropriate leadership style.
 - Guide people to change.
 - Determine strategies for problem solving, as well as decision making.
4. Control: consists of reviewing what was planned and what was achieved; involves determining:
- The activities that need to be controlled.
 - The means of control that will be used.

According to the author, the administrative process is fundamental for the efficient and effective functioning of an organization. That is, it provides an organized structure to effectively manage the daily operations of the organization. It facilitates informed decision making, facilitates internal coordination, enhances resilience to change and improves overall operational efficiency.

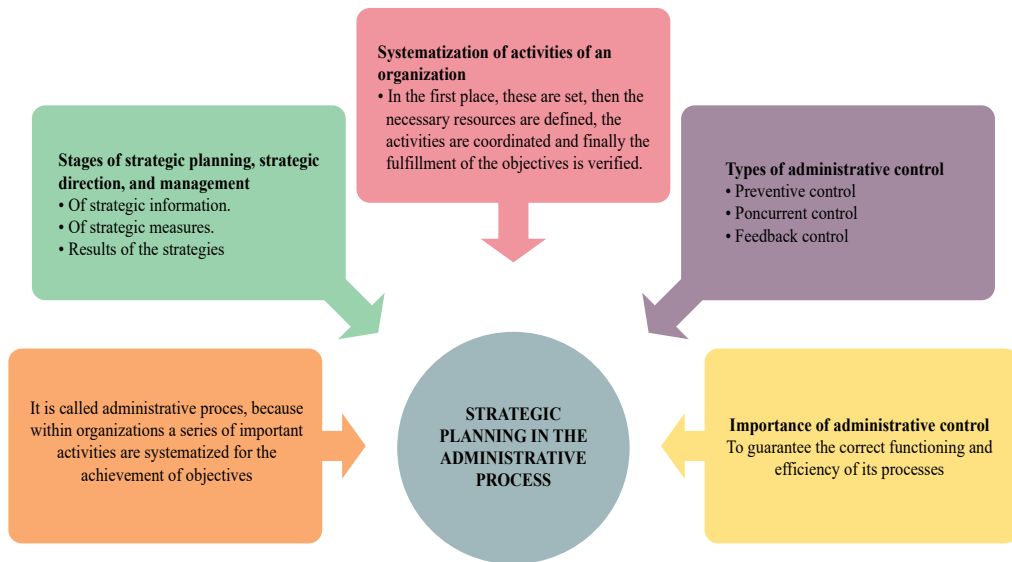
In conclusion:

1. Strategic planning in the administrative process is a tool that allows organizations to be prepared to face situations that arise in the future, thereby helping to direct their efforts towards realistic performance goals. The administrative process occurs as a continuous and connected flow of planning, organization, management, and control activities, established to achieve the use of human, technical, material and any other resources, with which the organization has to perform effectively.
2. The importance of strategic planning lies in systematically identifying the opportunities and dangers that arise in the future. These, combined with other important data, provide the basis for a company to make better decisions today to exploit opportunities and avoid pitfalls.
3. Strategic business planning is a sociopolitical process oriented by transformation objectives which allows organizations and/or compa-

nies to reach their goals by following a series of appropriate procedures and steps.

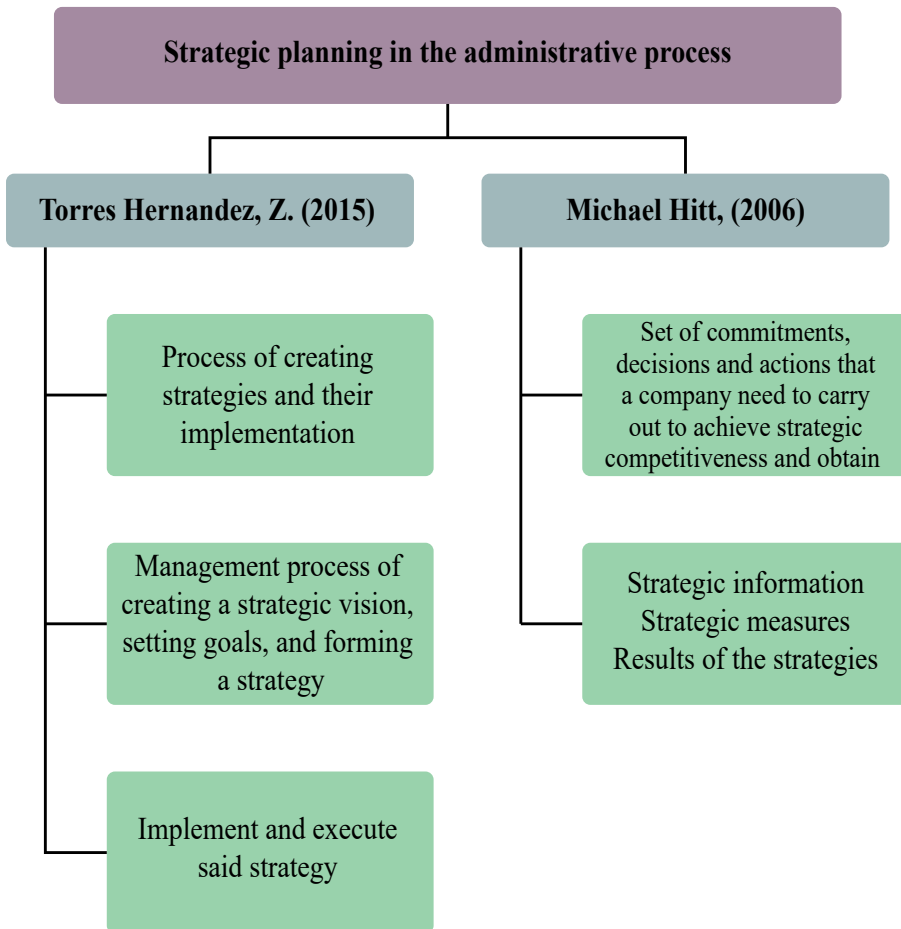
Graphic organizers

Strategic planning in the administrative process: circular diagram, broken down into systems, types, importance and stages.



Prepared by: The authors

Strategic planning in the administrative process: conceptual diagram.



SOLVED QUESTIONNAIRE

1. What does the process of creating strategies and putting them into practice refer to?

Refers to the managerial process of creating a strategic vision, setting goals, and forming a strategy, as well as implementing and executing that strategy. Then, over time, initiating any corrective adjustments to the vision, goals, strategy, or execution that seem suitable.

2. The strategic management process is the set of:

Commitments, decisions, and actions that a company needs to carry out to achieve strategic competitiveness and obtain above-average profits.

3. What are the three stages of strategic planning, strategic direction and management?
 - Strategic information.
 - Strategic measures.
 - Strategies results
4. What is the systematization of an organization's activities to meet objectives??

In the first place, these are set, then the necessary resources are delimited, the activities are coordinated and finally the fulfillment of the objectives is verified.

5. According to Torres Hernández, Z. (2015) what is the process of creating strategies?

Refers to the managerial process of creating a strategic vision, setting goals, and forming a strategy, as well as implementing and executing that strategy. Then, over time, initiating any corrective adjustments to the vision, goals, strategy, or execution. that seem suitable.

6. According to Henry Fayol, what are the vital functions of administration?
 - Planning
 - Organization
 - Direction
 - Control
7. What is determined in planning?
 - The goals of the organization.
 - The best strategies to achieve the objectives.
 - Strategies to reach set goals.
8. At what level is strategic planning carried out?

It is carried out at the organizational level, that is, considering the global level of the company on which the objectives and strategies are based.

9. What are the types of administrative control?

- Preventive control
- Concurrent control
- Feedback control.

10. Why is administrative control important?

To guarantee the correct functioning and efficiency of its processes. This will allow them to increase profits, reduce costs and offer a better product to their customers

1.5 ADMINISTRATION AND STRATEGIC DIRECTION

Strategic Management Author Definitions

- According to Hernandez, (2015) strategic management is the process of creating strategies and putting them into practice. Refers to the managerial process of creating a strategic vision, setting goals, and formulating a strategy, as well as implementing and executing that strategy, and then, over time, initiating any corrective adjustments to the vision, goals, strategy, or execution that seem suitable.
- Gonzalez, (2015) defines as the art and science of formulating, implementing and evaluating cross-functional decisions that allow the organization to achieve its objectives.
- According to Gonzalez, (2015) it consists of developing a business concept and forming both a vision and a mission of where the company will need to be directed, transforming the mission into specific results objectives, developing a strategy, implementing and putting into practice the related strategy, reviewing the current situation, and initiating corrective adjustments.
- According to Porter LW, (2006) strategic management is a type of planning process through which managers: Set the direction and general

objectives of the organization, formulate a specific strategy, plan and carry out the implementation of the strategy, and finally, verify the objectives and results of the organization to make any necessary adjustments.

- According to Velasquez, (2007) it deals with aspects within the administrative process that are involved in ensuring organizational viability and that the entity's resources are adapted to the environment in such a way that allow efficient achievement of its corporate objectives, using courses of action with and acceptable risk.

Authors' Definitions of the Strategic Management

- **According to Steel, (2010)**, strategic management is the art and science of putting into practice and developing all the potential of a company to ensure its long-term survival, competitiveness, effectiveness, efficiency and productivity.
- **According to Hernandez, (2015)**, strategic management can be divided as: The definition of strategic objectives, it consists of the definition of the company's philosophy and mission. Also, it establish what the short and long-term objectives will be that allow the company's mission to be achieved, and that allows defining the current and future business activities of the organization.
- According to Rosemary, (2004), It is the extension of strategic planning, which incorporates programming, budgeting, information and control systems.
- According to Porter LW, (2006) strategic management is a process of systematically evaluating a business and defining long-term goals, identifying goals and objectives, carrying out tactics to achieve them, and allocating resources to realize them.
- According to Harrison JS, (2002) it is the procedure through which organizations analyze and learn from their environments and exterior, dictate the strategic direction, create strategies aimed at achieving established objectives, and execute said strategies to satisfy the demands of a key part of the organization.

The authors' statements exemplify that leadership and strategic direction are

important because they provide clear guidance for achieving long-term objectives, enable rapid adaptation to internal or external changes, create sustainable competitive advantages, facilitate informed decision making based on thorough analysis, and foster alignment. Organizational alignment enables continuous improvement and fosters sustainable success in a competitive business environment.

In conclusion, it can be said:

Strategic management

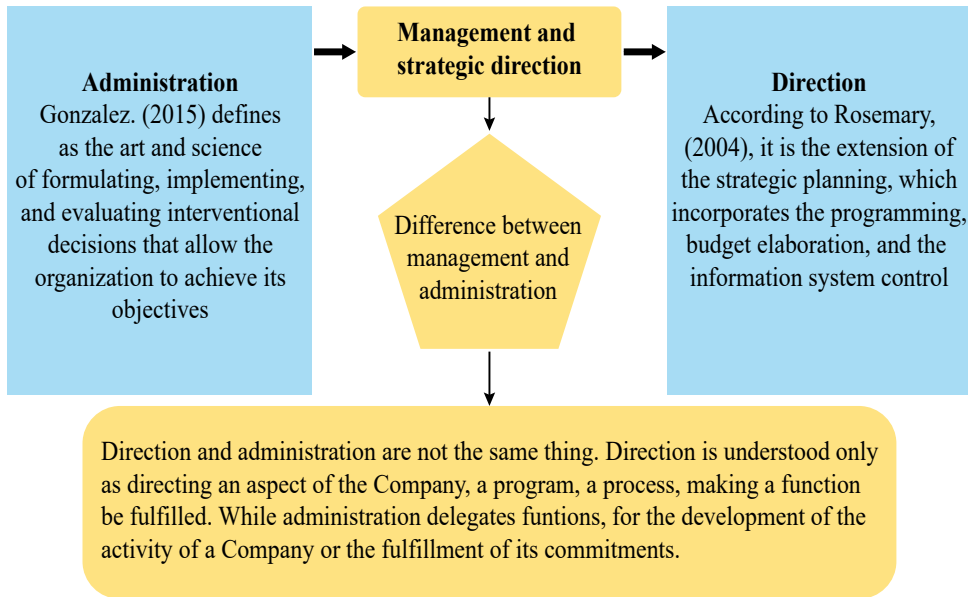
- Strategic management is the development and implementation of strategies in order to direct the behavior of companies towards their stated objectives.
- Strategic management is the formulation, implementation and evaluation of a process by which strategies are implemented and executed, setting an efficient course for the achievement of corporate objectives.
- It is a tactical discipline, which allows to define, evaluate and establish the different decisions and actions of an organization or company, through the analysis and diagnosis, both its external and internal movement.

Strategic direction

- The Strategic Management is a management instrument that makes it possible to implement the tasks and the path that companies have to follow to achieve the planned goals, bearing in mind the changes and requests that their field requires. In this sense, it is a fundamental instrument for making elections within any organization.
- It is a systematized evaluation process that helps to analyze both external and internal environments, which helps to identify goals and purposes to be carried out in order to achieve the proposed corporate objectives.
- It seeks to align decisions made by the company through the functions that allow it to achieve the objectives set with the allocation of resources that are necessary to achieve these objectives.

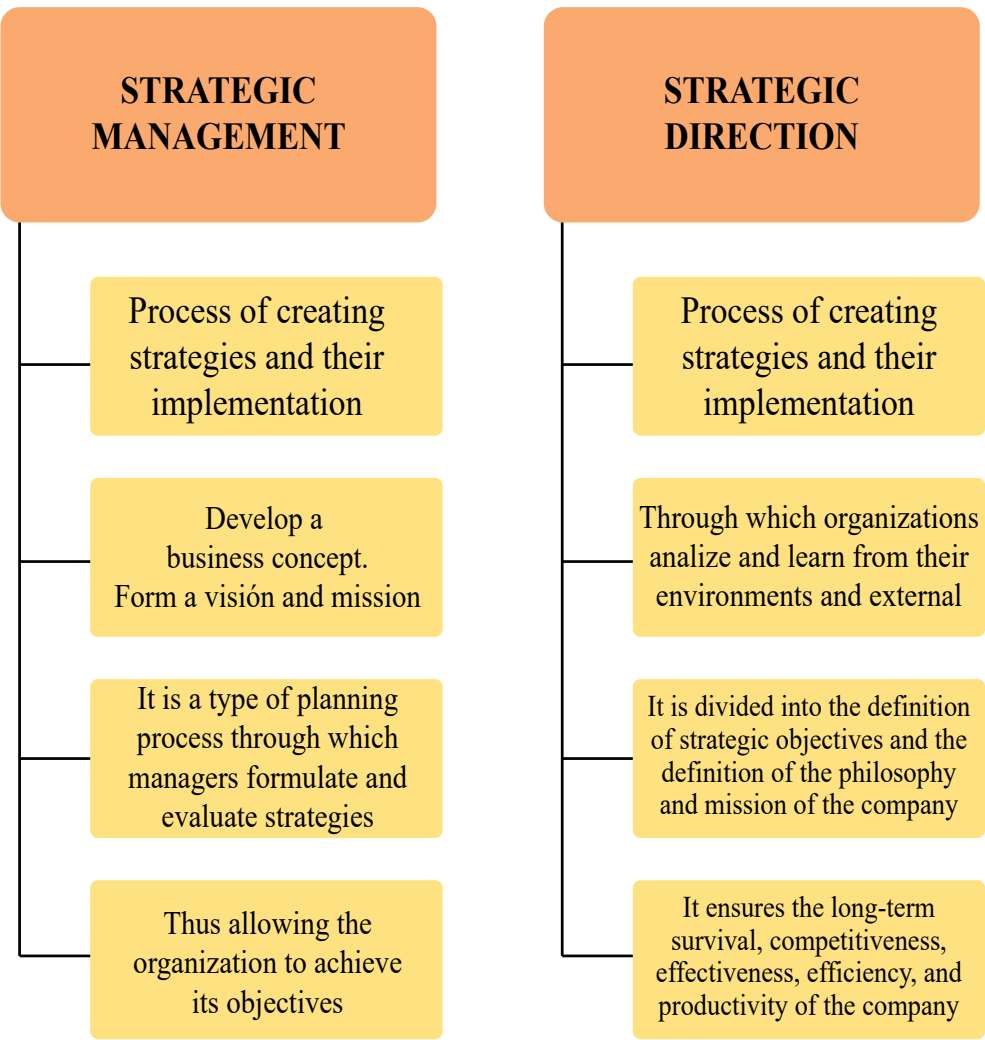
Graphic organizers

Management and strategic direction: conceptual diagram, broken down into the difference between management and administration.



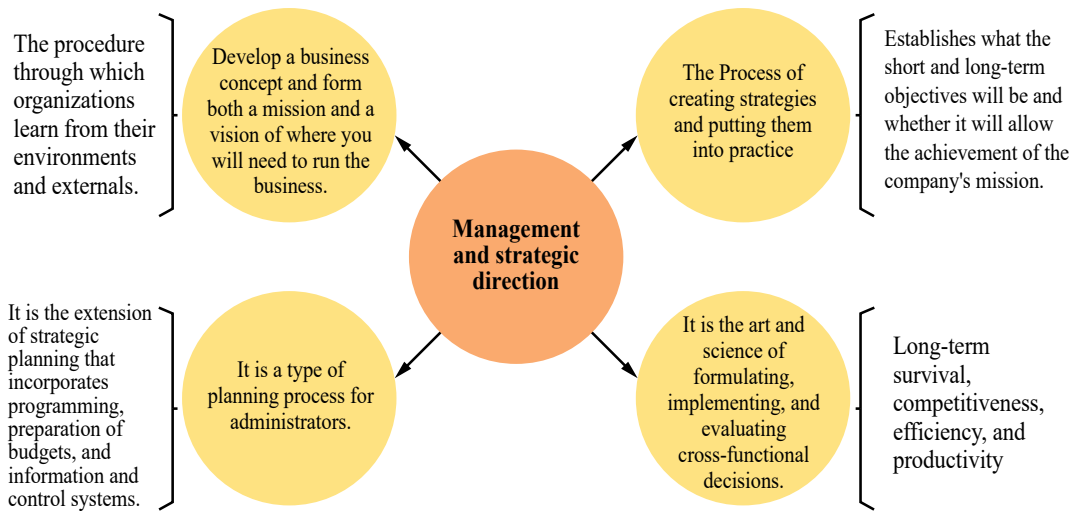
Prepared by: The authors

Strategic management and strategic direction: conceptual diagram, detailed in processes, types, objectives.



Prepared by: The authors

Management and strategic direction: circular diagram, divided into conceptual processes.



Prepared by: The authors

SOLVED QUESTIONNAIRE

1. How does Porter define strategic management?

According to Porter, (2006) strategic management is a type of planning process through which managers: Set the direction and general objectives of the organization, formulate a specific strategy, plan and carry out the implementation of the strategy. Finally, they verify the results and make the necessary adjustments.

2. How does Romero define strategic management?

According to Romero, (2004) It is the extension of strategic planning, which incorporates programming, budgeting, information and control systems.

3. Write the difference between management and administration

Direction and administration are not the same thing. Direction is un-

derstood as directing an aspect of the Company, a program, a process, making a function be fulfilled. On the other hand, administration delegates functions, for the development of the Company's activity or the fulfillment of its commitments.

4. How does Hernández divide the strategic direction?

According to Hernández, (2015) strategic direction is divided into the definition of strategic objectives and definition of the company's philosophy and mission .

5. What is the definition of strategic management according to Gonzales?

It is the art and science of formulating, implementing, and evaluating the cross-functional decisions that enable the organization to achieve its goals.

6. The process of strategic management based on the author Hernández consists of:

Create a strategic vision, to establish objectives, Formulate, Implement and Evaluate strategies.

Plan, organize, direct, control

Plan, do, check, control

External and internal analysis, competitive profile analysis and SWOT analysis

7. According to Hernández's vision, how does he refer to strategic management and what is the approach he directs?

Strategic management is the process of creating strategies and putting them into practice. Refers to the managerial process of creating a strategic vision, setting goals, and formulating a strategy, as well as implementing and executing that strategy. Then, over time, initiating any corrective adjustments to the vision, goals, strategy, or execution. that seem suitable.

8. Does one of the authors mention that strategic management is an art as well as a science because the author contextualizes it this way?

It is the art and science of putting into practice and developing all the potential of a company that will ensure its long-term survival, its competitiveness, its effectiveness, efficiency, and productivity.

9. Does Romero's concept, show an extension of the strategic direction in which this proposed system helps?

It is the extension of strategic planning, which incorporates programming, budgeting, information and control systems. It allows faster management in the event of a fault and makes easier and identifiable corrections within the system.

10. According to Porter's definition, what does he refer to by strategic management as an evaluation process?

Strategic management is a process of systematically evaluating a business and defining long-term goals, identifying goals and objectives, carrying out tactics to achieve them, and allocating resources to realize them.

CASE STUDY

Nestlé

This world leader in nutrition, health and wellness, has used different directions and methods to grow. Example of this are their digital marketing strategies, in 2015 they used a technique with which they got more sales, they were discounts and coupons that consumers got through their website, once registered they could print them and use them in their usual stores and supermarkets.

Another are social networks, such as Facebook, Twitter, its own website, Flickr, Instagram, YouTube and a variety of applications for mobile or tablet.

In 2010, it acquired the frozen pizza division of Kraft Foods and launched the Nestlé Cocoa Plan and the Nescafé Plan, with the aim of establishing sustainable supply chains for cocoa and coffee, improving social conditions in the producing communities and ensuring their profitability. Organizational culture and sustainable development (Serrano, 2023).

CHAPTER 2

THE ORGANIZATION FOR AN INTEGRAL STRATEGIC MANAGEMENT

2.1 ADMINISTRATION AND MANAGEMENT

Administration author definitions

According to Porter L., (2006) it is a process of structuring and using sets of resources oriented towards the achievement of goals, to carry out the tasks in an organizational return.

According to Munch Galindo, (2015) administration is a process through which the resources of a social group are coordinated and optimized in order to achieve maximum efficiency, competitiveness, quality and productivity in achieving its objectives.

Sanchez Delgado, (2015) mentions that the administration can be defined as the process of creating, designing and maintaining an environment in which people work or work in groups, and efficiently achieve selected goals. With administration, people carry out functions of planning, organization, integration of personnel, direction, and control.

According to Charles, (2010) management is an activity that means to direct, lead or govern the company in operation. Therefore, the administration supposes an organized and planning activity, to which the functions of control and direction are added as ways of carrying out all programming and organization.

Heinz, (2004) defines administration as a set of activities aimed at using resources efficiently and effectively in order to achieve one or more objectives or goals of the organization.

Thus, administration and management are essential to the success of any organization, as they allow for efficient resource management, strategic decision making, work coordination, staff motivation and adaptability to change.

In conclusion, it can be stated:

- Management is a process by which the fulfillment of a company's objectives is coordinated to reach maximum efficiency, quality and productivity in achieving its proposed goals.
- Management is a technique in which all available resources that a company has are planned, organized, and controlled in order to achieve the company's goals and objectives.
- It is the science or art of planning, controlling and directing the different financial, human, and technological resources within an organization.
- It is the set of actions, which allows organizing the available resources, to meet the determined objectives.

Management, authors' definitions

Prieto Herrera, (2008), management is defined as a body of knowledge applicable to the effective direction of an organization.

According to Juliao Esparragoza, (2016), management is a difficult term to define: it means different things to different people. Some identify it with functions performed by entrepreneurs, managers or supervisors, others refer to a particular group of people.

According to Velez Bedoya, (2007) management is the specific and distinctive body of any organization.

According to Guerrero, (2003) management is characterized by being an ideology whose rhetoric is based on the firm belief of the benefits of the scientific method's rationale. It emphasizes the design and structure of the organization, and conceives the life of the company as a means to achieve productivity, profitability and prosperity.

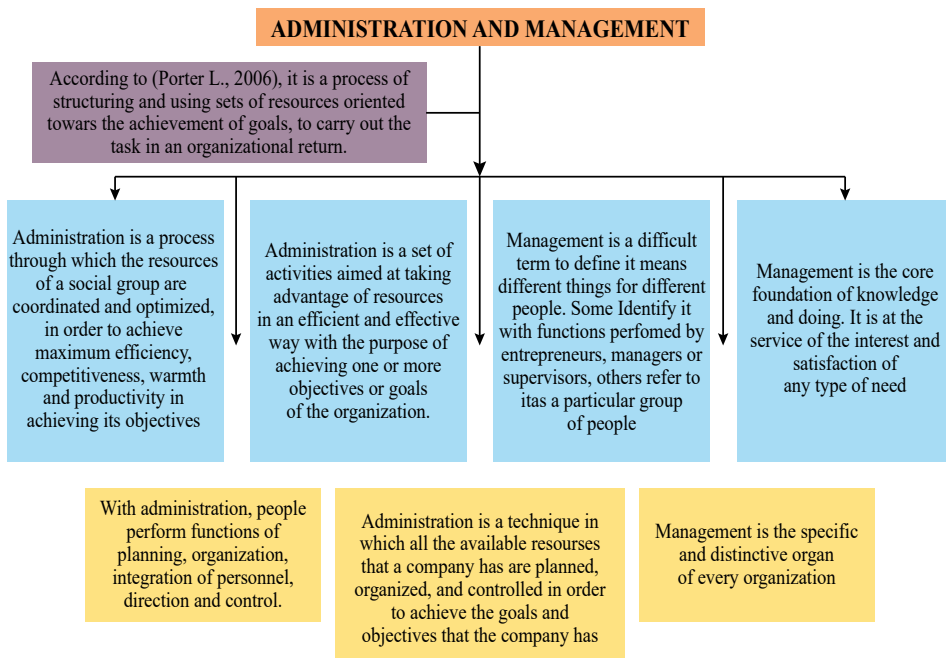
To Occhiuzzi, (2016) management is the core foundation of knowledge and practice. These conditions impose a practical character par excellence. It is at the service of an interest of satisfaction of any type of need; therefore, it is a committed knowledge of principle. Administration and management are part of the knowledge whose epistemological support is pragmatic ideological court.

In conclusion, it can be stated as:

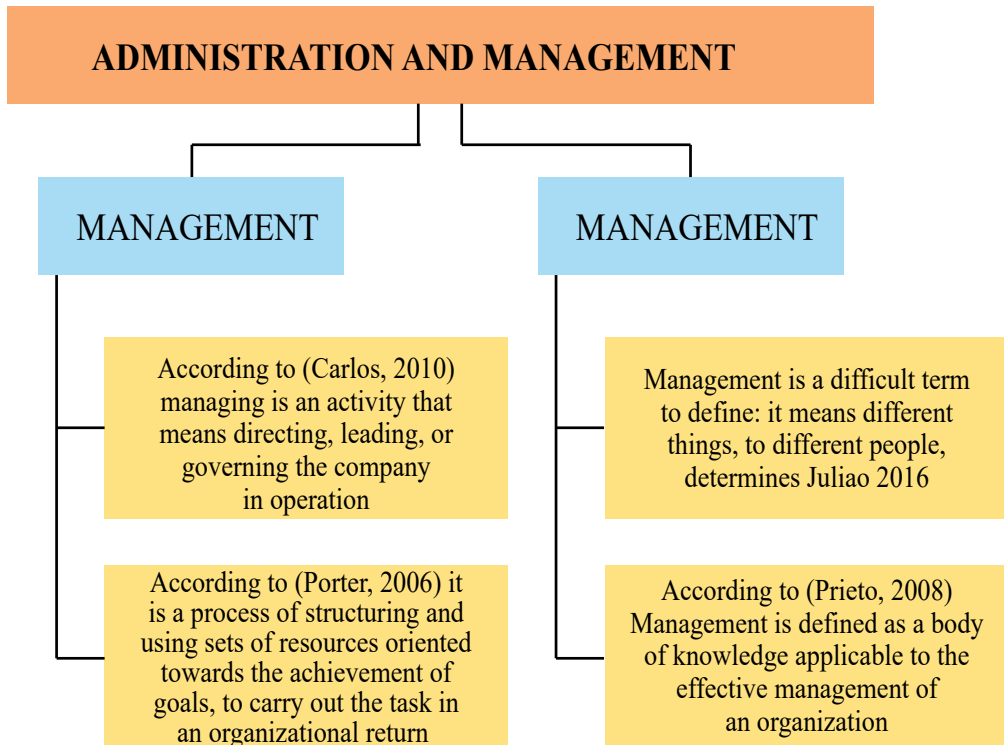
- According to the authors' point of view, management is a process that follows a series of well-defined steps, which allow a perfect mesh between resources (physical and human), achieving the objectives set.
- Management is making decisions on how to guarantee the availability of resources and thus be able to manage them to meet the proposed objectives as long as all participating elements of the organization are led and delegated
- It is to lead, guide the members in charge seeking to meet the medium and long-term objectives of the organization through correct and timely decisions for the organization.
- It is the set of activities that are carried out by the administration or management of an entity.

Graphic organizers

Administration and management: conceptual diagram, conceptually broken down and substantiated.

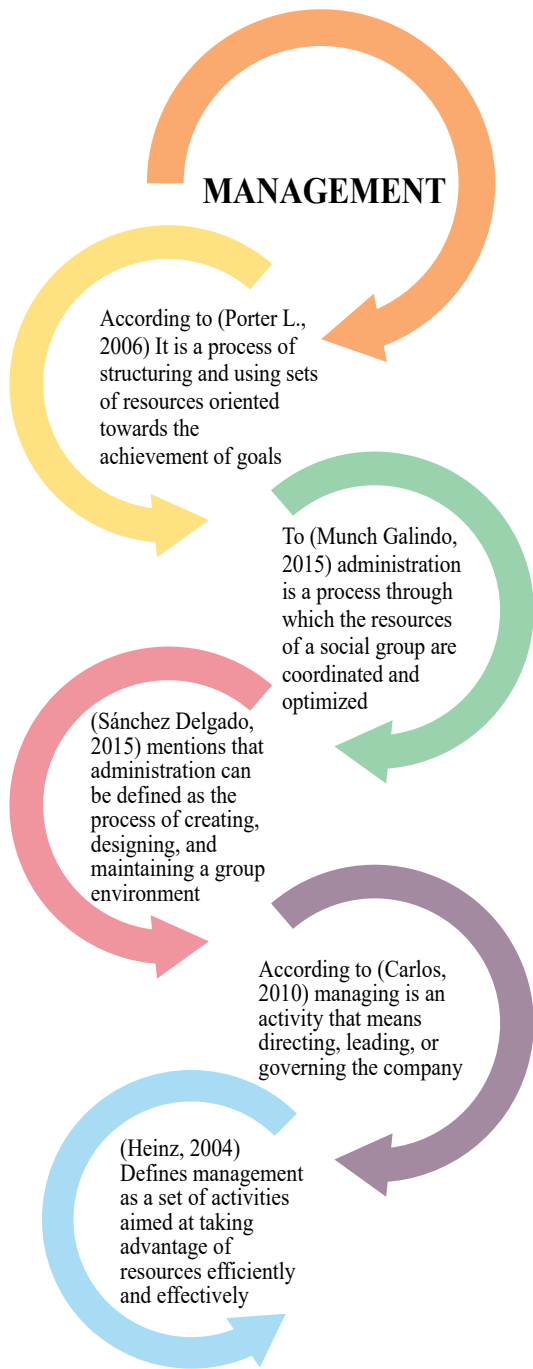


Prepared by: The authors



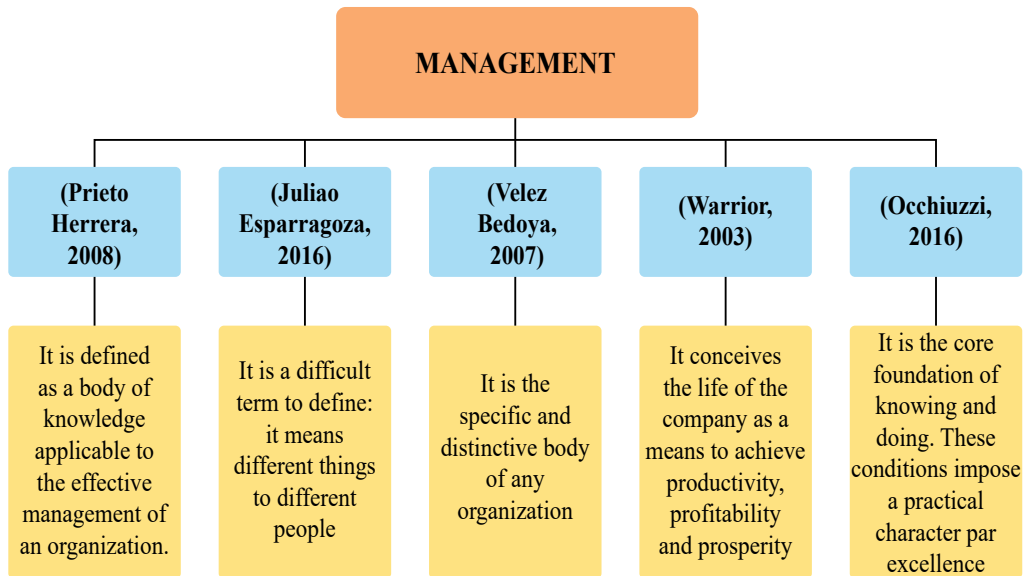
Prepared by: The authors

Management: conceptual diagram, conceptual process, designs and agreements.



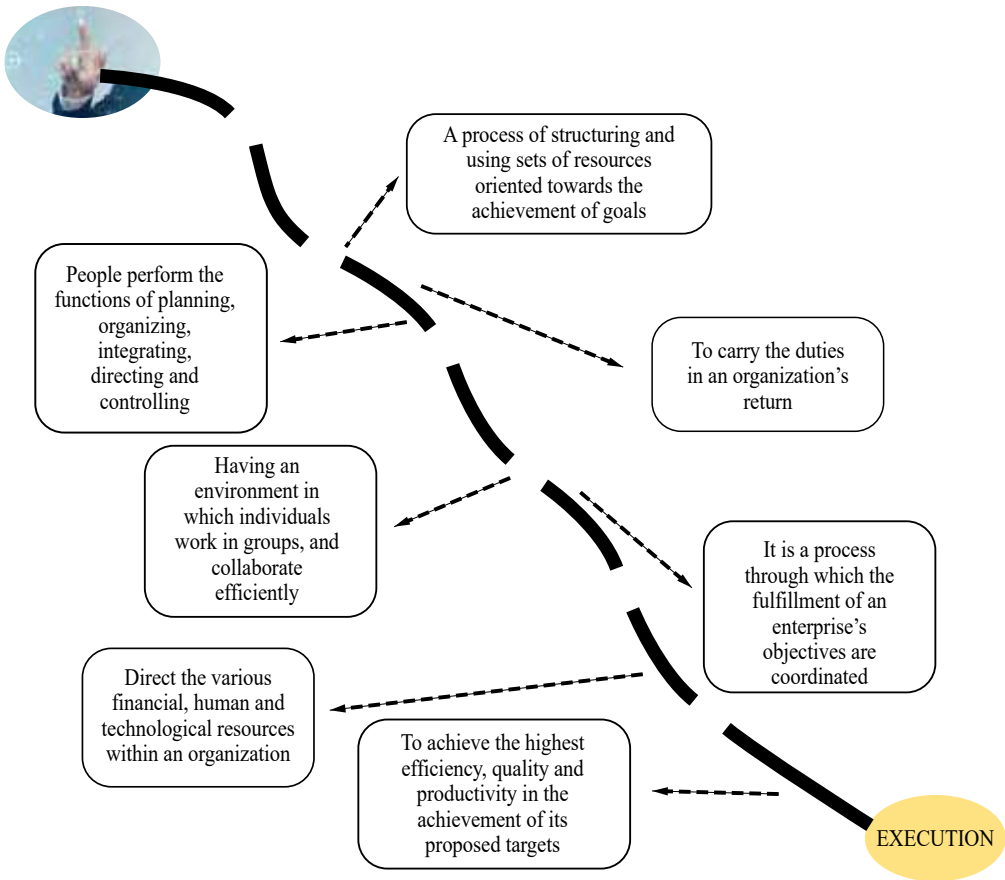
Prepared by: The authors

Management: conceptual diagram, broken down into different concepts and preceptions about management.



Prepared by: The authors

Structural Process: conceptual and procedural diagram broken down into different concepts.



Prepared by: The authors

SOLVED QUESTIONNAIRE

Administration Quiz

1. Complete the concept of administration according to the author Porter, (2006)

It is a process of structuring and using sets of resources oriented towards the achievement of goals.

To carry out tasks in an organizational setting

To carry out the objectives determined by the institution

Set a number of goals and objectives and meet them within a certain period

Establish rules which must be followed

2. Mention the author who determines the following management concept.

It is an activity that means directing, conducting or governing the company in operation. Therefore, the administration supposes an organized and planning activity, to which the functions of control and direction are added as ways of carrying out all programming and organization.

a) (Heinsz, 2004)

b) (Senchez Delgado, 2015)

c) (Baldwin, 2010)

d) (Porters, 2006)

3. How does the author, Munch Galindo, (2015), define administration?

Administration is a process through which the resources of a social group are coordinated and optimized, in order to achieve maximum

efficiency, competitiveness, quality and productivity in achieving its objectives.

4. Sánchez Delgado, (2015) defines administration as a process of...

Organize, motivate, direct, integrate

Create, design, maintain a group work environment

Create, control, design, teamwork

Motivate, design, plan

3. Read and rewrite the definition of management correctly: Heinz, (2004) defines management as a set of processes aimed at reusing resources efficiently for the purpose of achieving one or three objectives or visions of the organization.

Heinz, (2004) defines administration as a set of activities aimed at taking advantage of resources efficiently and effectively in order to achieve one or more objectives or goals of the organization.

Management Questionnaire

1. Write V if the statement corresponds to the author and F if the statement does not correspond to the author.

a) According to Prieto Herrera, (2008) Management is the core foundation of knowing and doing. These conditions impose a practical character par excellence. (F)

b) According to Velez Bedoya, (2016) Management is the specific and distinctive body of any organization. (V)

c) According to Guerrero, (2003) management is an ideology whose rhetoric is based on the firm belief in the benefits of scientific method's rationale. It emphasizes the design and structure of the organization, conceives the life of the company as a means to achieve productivity, profitability, and prosperity. (F)

d) According to Occhiuzzi, (2016) Management is defined as a body of knowledge applicable to the effective management of an organization (F)

e) According to Juliano Esparragoza, (2016) Management is a difficult term to define: it means different things to different people. Some identify it with functions performed by entrepreneurs, managers or supervisors, others refer to a particular group of people.(V)

2. They are in charge of directing, managing or administering a company, or other entity.

- a) Management
- b) Plannealing
- c) Management
- d) Strategy

3. When we talk about management we mean managing:

- a) Roles of a maximum range
- b) Mid-range and important areas
- c) Strategic argos
- d) High rank and importance

4. What is the goal of managing a company?

- a) Influence, motivate and make all team members work
- b) Direct the company, make decisions, supervise and be a leader within it.
- c) Manage most decisions and delegate them appropriately.
- d) Diagnostic capacity. Credibility and ability to transmit knowledge.

5. What are the characteristics of a manager?

- a) For an ideology whose rhetoric is based on a firm belief in the rationale benefits of the scientific method.
- b) It will accurately set the priorities of the agenda.
- c) Good managers are understanding and praise their employees

when they deserve it.

d) It will not multiply the topics of the negotiation

e) Conceptual maps

2.2 THE ROLE OF MANAGEMENT IN THE COMPANY

Author definitions

According to Prieto, (2008), sales management must know the business process of the companies taking into account the business environment in its technological and demographic aspects, competition, customers, suppliers, market trends, the evolution of the economy and legal regulations. It also take into account the internal aspects of companies such as structure, culture, strategy, systems, personnel and organizational objectives.

To Giraldo & David, (2016), Management must do its best to design territories that are as balanced as possible between them (similar levels of unit sales and money, workload, distances, etc.), so that with similar efforts similar results are obtained. In addition to allowing better control and evaluation of performance, this contributes to the motivation of salespeople when they compare themselves with their colleagues.

According to Occhiuzzi, (2012), Marketing management contributes to the achievement of the organization's objectives, identifies and increases market share to ensure its survival, generates profitability to ensure the return on investment of partners and encourages market expansion. in such a way as to maximize the value of the company.

Drucker, (1954), mentions that the director or manager is the dynamic and life-giving element of any business. Without his guidance the "resources for production" remain resources and never become production. In an economic system of competition, above all, the quality and performance of managers determine the success of a business and, even more, its survival, because they constitute the only advantage that a company can have within that system.

Mintzberg quoted by Culter, (2009), says that the best way to describe what managers do is to look at the roles they play at work. From his studies he concluded that managers play 10 closely related roles. The term "manager roles"

refers to particular categories of managerial behavior. Mintzberg's 10 roles are grouped into personal relationships, information transfer, and decision making. Personal Roles: The three personal roles are authority figure, leader, and liaison. Informational Roles: The three roles include supervisor, broadcaster, and spokesperson. Decision Roles: The four decision roles are: entrepreneur, disturbance handler, resource allocator, and negotiator.

To **Muñoz López, (2008)**, states that, within the role assigned to management, the first function that falls on it is economic realization: "management can only justify its existence and its authority through the economic results it produces."

In summary, the role of management in a company management plays a crucial role in a company, from making strategic decisions to coordinating work, motivating employees and managing talent effectively. Good leadership can determine the success or failure of an organization.

In conclusion

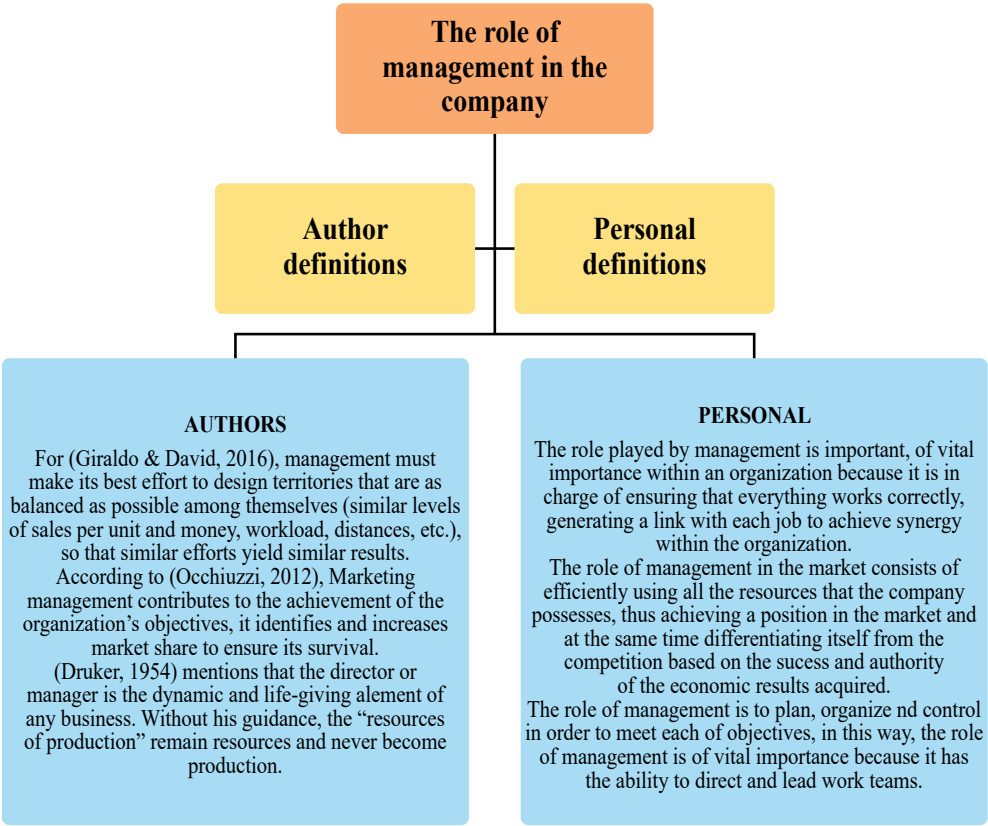
The role played by management is crucial, and of vital importance within an organization because it is in charge of ensuring that everything works correctly, generating a link with each job to achieve synergy within the organization.

The role of management in the market consists of efficiently using all the resources that the company possesses, thus achieving a position in the market and at the same time differentiating itself from the competition based on the success and authority of the economic results acquired.

The role of management consists of planning, organizing and controlling in order to meet each one of the objectives, in this way the role of management is of vital importance because it has the ability to direct and lead work teams, due to the skills that have adaptability, knowledge, emotional intelligence, leadership and ability to delegate certain tasks.

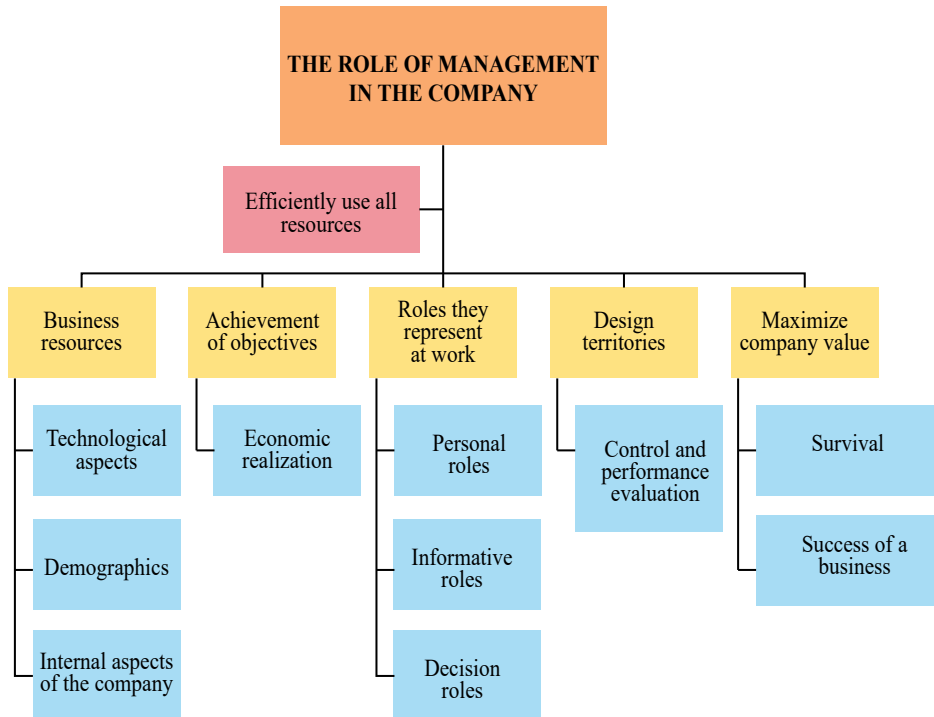
Graphic organizers

The role of management in the company: conceptual diagram, broken down into different concepts and preceptions about management in the company.



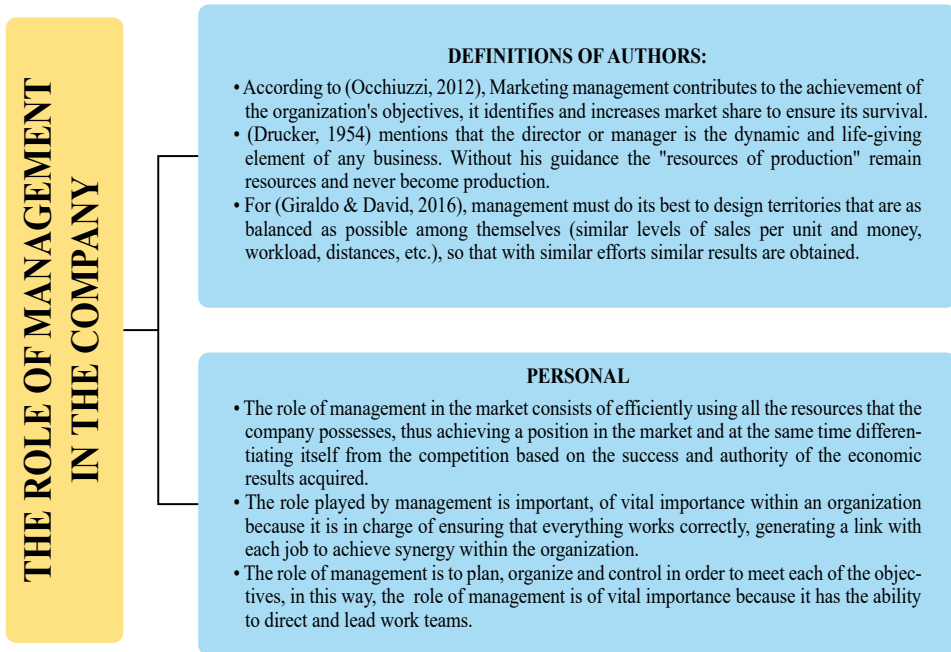
Prepared by: The authors

The role of management in the company: conceptual diagram, broken down into different concepts, roles and general aspects.



Prepared by: The authors

The role of management in the company: conceptual diagram, broken down into different concepts and preceptions about management in the company.



Prepared by: The authors

Solved Questionnaire

1. What are the aspects a manager must take into account in the business environment?

Technological, demographic aspects, competition, customers, suppliers, market trends, evolution of the economy and legal regulations.

2. What does Muñoz López manifest within the role assigned to management?

Management can only justify its existence and authority by the economic results it produces.

3. Drucker mentions two fundamental words that determine the success and survival of the company.

Quality and Performance.

- 4. According to (Culter, 2009), what does the expression “manager roles” refer to?**

It refers to particular categories of managerial behavior.

- 5. Mention how many managerial roles exist according to Mintzberg and how many are grouped.**

Mintzberg mentions that there are 10 managerial roles, which are grouped into personal relationships, information transfer, and decision making.

- 6. Describe each of the roles that make up the personal, informational, and decisional roles.**

Personal Roles: The three personal roles are authority figure, leader, and liaison.

Informational Roles: The three roles include supervisor, broadcaster, and spokesperson.

Decision Roles: The four decision roles are: entrepreneur, disturbance handler, resource allocator, and negotiator.

- 7. According to Muñoz López, (2008) which is the first function that falls within the role assigned to management.**

The first function that falls on the role assigned to management is economic performance.

- 8. From Occhiuzzi, (2012), mention one of the main objectives that stands out in marketing management.**

One of the main objectives in market management is based on maximizing the value of the company.

- 9. What should management do to design balanced territories within the organization?**

It should allow better control and evaluation of performance, which contributes to the motivation of salespeople when they compare themselves with their colleagues.

10. To Drucker, (1954) what does the manager mean? and what does his guide show.

Drucker, (1954), mentions that without his guidance the “resources of production” remain resources and never become production.

2.3 TASKS AND FUNCTIONS OF MANAGEMENT

Author definitions

Management is a position held by the director of a company which his multiple functions are, representing society against third parties and coordinate all resources through the process of planning, organization, direction and control in order to achieve established objectives.

Organizational management is a complex process, which consists of the sequential execution of steps or phases, which constitute the typical work of an administrator or manager. These tasks can be expressed in a general way as managerial functions, which are exercised at various levels: Publishing M, (2007)

- **Planning:** It consists of establishing the long, medium and short-term objectives (or goals) of the organization, and specifying the courses of action that will be followed to achieve them. There must be coherence between the various temporary levels of objectives, which, on the other hand, must be concrete, clear, and if possible, quantifiable, in order to later compare results. It also includes the analysis of the necessary resources, their adequacy and availability; and all this must finally be specified in plans, programs and budgets.
- **Organization:** It consists of designing and determining functions and tasks, establishing operating units, departments, divisions, etc., and defining the circuits and modalities of communication between these units. This organization must respond to two basic requirements, apparently contradictory but complementary: the need to divide the tasks and the need to coordinate them. The organization function coordinates tasks by establishing permanent relationships between entities, to set up a hierarchical authority structure, and establish the degree of centralization or decentralization in decision-making.

- **Direction:** It consists of orienting (“directing”) the efforts of all the employees of the organization, including managers, towards obtaining the organizational goals. The managerial function is related to the permanent, long-term objectives of the organization; and with the constant changes of the context with which the organization is vitally related. The management function also deals with the selection of the personnel who will carry out the positions designed, their integration into the company as a whole, the orientation of their work, training and motivation, establishing the most appropriate leadership system, as well as the scheme of their remuneration and promotions, that is to say, of everything related to the management of the so-called “human resources”.
- **Control:** It consists of ensuring that everything is done according to forecasts, ensuring that the objectives of the organization are obtained, by comparing the actual results with the expected results, to define the level of adjustment or divergence between the two, and undertake corrective actions, to redirect the situation. The control function is thus closely linked to the planning function. Results cannot be controlled without previous forecasts, and new goals cannot be established without controlling previous results.

Administration as management is defined as the set of activities of planning, organization, coordination, direction and control. Such activities or functions of the administration have been considered the foundations of management to this day. These elements are: Vélez Bedoya Á. R, (2007)

- **Planning:** Ability to listen to the future and design the action plan.
- **The organization:** The constitution of the double body of the organization understood as the material and the social.
- **The direction:** It consists of making the plan work; is to give the orders so that the planned activities are carried out.
- **Coordination:** It is the harmonization of acts and efforts.
- **The control:** It is the verification of compliance with the plans.

Management as an academic discipline, it is necessary to consider it as a process. When management is viewed as a process, it can be analyzed and described

in terms of several fundamental functions. However, some caution is needed. When discussing the management process it is convenient, and even necessary, to describe and study each function of the process separately. As a result, it might appear that the management process is a series of separate functions, each one nested tightly in a separate compartment. In practice, a manager can (and often does) perform simultaneously, or at least continuously, all or some of the following four functions: Planning, Organizing, Directing, and Controlling. Baldwin C., (2010)

- **Planning:** When management is viewed as a process, planning is the first function to be executed. Once the objectives have been determined, the means necessary to achieve these objectives are presented as plans. An organization's plans determine its course and provide a basis for estimating the degree of likely success in meeting its objectives. Plans are prepared for activities that require a short time, sometimes years, to complete, as well as for short-term projects.
- **Organization:** In order to put into practice and execute the plans, once they have been prepared, it is necessary to create an organization. It is the function of management to determine the type of organization required to carry out the plans that have been developed. The kind of organization that has been established largely determines whether the plans are appropriate and wholly appropriate. In turn, the objectives of a company and the respective plans that allow its realization, exert a direct influence on the characteristics and structure of the organization.
- **Direction:** This third managerial function involves the concepts of motivation, leadership, guidance, encouragement and performance. Although each of these terms has a different connotation, they all clearly indicate that this managerial function has to do with the human factors of an organization. It is as a result of the efforts of each member of an organization that achieves its purposes, hence directing the organization in such a way that its objectives are achieved in the most optimal way possible, is a fundamental function of the management process.
- **Control:** The last phase of the managerial process is the control function. Its immediate purpose is to measure, qualitatively and quantitatively, the execution in relation to the patterns of action and, as a result of this comparison, determine if it is necessary to take corrective action

or remedy that directs the execution in line with the established norms. The control function is exercised continuously, and although related to the organization and management functions, it is more closely associated with the planning function.

Management is a process for managing company resources in order to achieve company objectives. In this sense, the importance of this process in the operation and success of any company is undeniable. Therefore, we have considered it necessary to remember what its foundations are. Torres Hernandez Z, (2014)

- **Organize:** Build a structure between the human being and his abilities.
- **To plan:** Design action plans based on the future of the company.
- **To coordinate:** Direct all plans along the same path in a harmonious way.
- **Steer:** Guide the activities before the working staff.
- **Check:** Everything must be governed by the previously established rules and therefore, it must be guaranteed that the effort and work of each employee is in harmony with what the company pursues.

Successful management involves creative problem solving, employee motivation, and various leadership and management roles that ensure the achievement of an organization's goals and objectives. There are five functions to achieve this: planning, organization, personnel management, coordination and control. These functions separate the management process from other business functions, such as marketing, accounting, and finance. Moreno Castro T.F, (2016)

- **Organization:** The function of the organization in part to the management is to control the general structure of the company. The organizational structure is the foundation of the company; without the structure, the day-to-day operation of the business becomes difficult and unsuccessful. Organizing involves delegating tasks and responsibilities to employees with the specific skill set needed to complete the task.
- **Personnel management:** The function of the staff in management is to carry out the recruitment and personal needs of the organization. The main purpose is to hire the right people for the right job and thus achieve the objectives of the organization.

- **Coordination:** The coordination function controls all organization, planning, and staffing activities of the company and ensures that all activities work together for the good of the organization. Coordination typically results in meetings and other planning sessions with the company's major departments to ensure that all departments are on the same page in terms of goals and objectives.
- **Control:** The management control function is very useful to ensure that all other functions of the organization are in place and are being carried out successfully. Control includes setting performance standards and monitoring employee performance to ensure that each employee's performance meets those standards.

2.3.1 THE TASKS OF MANAGEMENT

According to (Drucker, 2013) Management is the specific organ of the commercial company. Whenever we talk about the decision of a company, to build a new factory, to lay off workers or to treat their teeth honestly, we are really talking about a management decision, a management act, a management conduct. The company can decide to act and behave only as its managers do.

In summary, the company's tasks and functions are essential for success in any leadership position. These skills include effective leadership, sound decision making, clear communication, effective time management, strong team building and the ability to adapt to change. Mastering these skills is critical to achieving positive individual and organizational results.

First task: run a business.

Running a business is a matter of intuition or natural ability; its elements and requirements can be analysed, can be systematically organized, and can be learned by anyone who is normally gifted.

The manager can improve his performance in all aspects of his work, including conducting business, through the systematic study of principles, the acquisition of organized knowledge, and the systematic analysis of his own performance in all aspects of his work and his tasks at all levels of management.

In fact, nothing else can contribute as much to his ability, his effectiveness and performance. And underpinning this point is the conviction that the mana-

ger's influence over modern society and its citizens is so great that it demands of him the self-discipline and high ethical standards of a true professional.

Second Task: Manage Managers

To obtain an economic realization there must be a company. The second function of management is to convert human and material resources into a productive company. Specifically, this is the function of directing managers.

The company must be capable, by definition, of producing more or better than all the resources it comprises. It must be a true whole: greater than the sum of its parts, or at least different from it with a performance greater than the sum of all consumptions.

Managers are also the most expensive resource in the company. In large companies we hear again and again that a good engineer or a good accountant with ten or twelve years of work represents a direct investment greater than \$50,000 to his contribution to the success of the company.

Directing managers therefore consists of making resources productive, turning them into companies. And management is such a complex and multifaceted thing, even in small businesses, where managing managers is inevitably not only a vital but a complex task.

Third task: Direct the worker in his work.

The ultimate function of management is to direct the Workers and the work. The work must be done and the resource for it are the workers. From the unskilled to the real craftsmen.

It also implies considering the human being as a resource, that is, as something that has peculiar physiological properties, capacities and limitations that require as much planning and attention as the properties of any other resource.

It cannot be said that one of these tasks predominates or requires greater skill or competence. It is true that the commercial realization occupies the first place, since it is the objective of the company and the reason for being. But if there is no active business, there will be no business, no matter how successful management is in running the business. The same can be said if the work and the worker are misdirected. The economic gains achieved by mismanaging managers are illusory and in reality, they destroy Capital.

The economic achievements achieved by misdirecting work and the worker are equally illusory. Not only do costs increase to the point where the company will no longer be able to compete.

The management of the business has primacy because the company is an economic institution, but the management of the managers and the management of the workers have primacy precisely because the company is not an economic institution and therefore has vital interests in these two aspects of business management, in which basic social beliefs and goals are realized.

In short, management tasks are fundamental to the effective management of an organization. Strategic planning, organization and coordination, sound decision making, in relation to the direction of the manager, workers and business are key elements in achieving business objectives and ensuring long-term sustainable success.

In conclusion, it can be stated:

1. The functions of management is a fundamental part for the company or organizations. With the proper application of these, workers of the company putting into practice the basic functions that are: planning, organization, direction and control will obtain results in a more efficient and effective way. It will help the organization, its workers and departments achieve its objectives in a better way.
2. The activities of management include business representation and coordination, direction and control of the company. The manager is in charge of the fate and the most important matters of a company business. That is why it is necessary that their activities and functions are carried out efficiently.
3. Managers set work priorities and manage expenses for a business, organization or office. They are also responsible for analyzing administrative operations and strategies, as well as supervising employee performance with the aim of suggesting and implementing new work methods and systems.

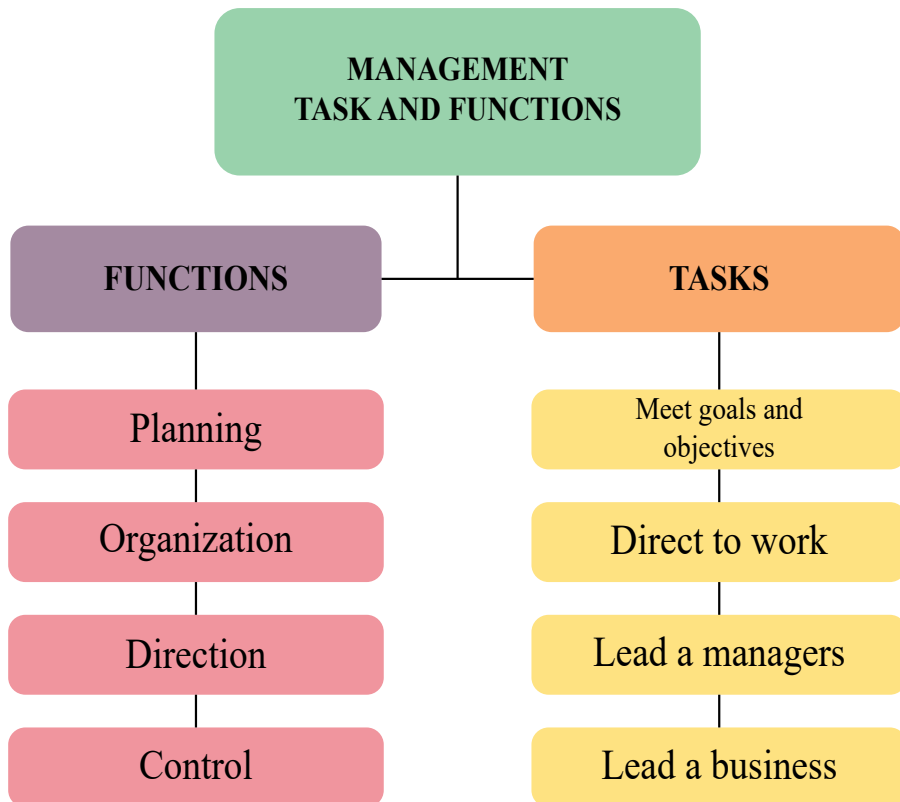
Daily tasks

- Train, guide, supervise and sanction administrative staff

- Make the necessary recommendations and adjustments to the current work methods and systems.
- Prepare presentations, proposals and reports

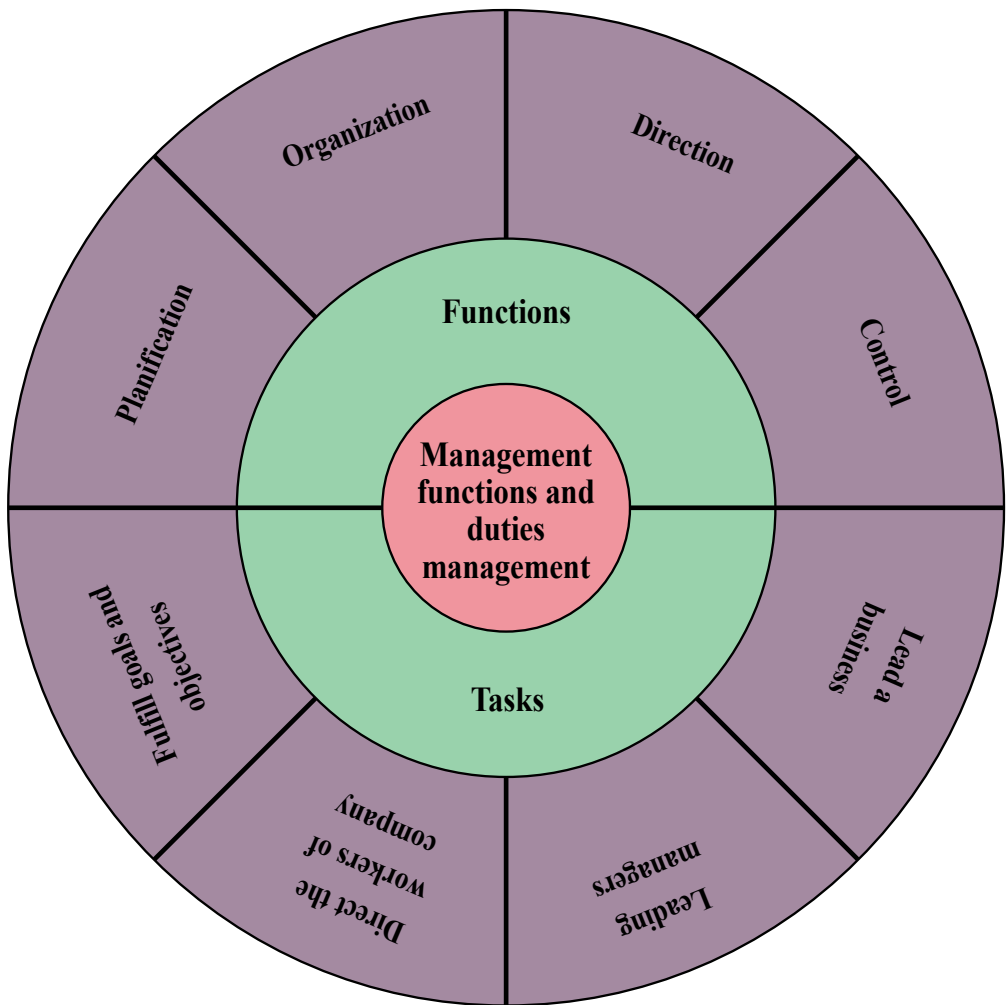
Graphic organizers:

Management tasks and functions: conceptual diagram, broken down into key words.



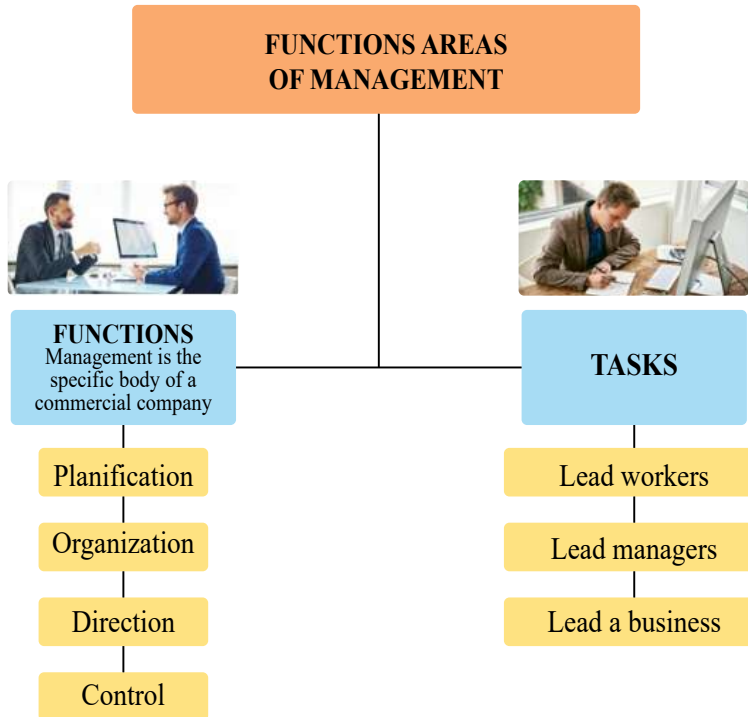
Prepared by: The authors

The role of management functions and tasks: pie chart, broken down into different general aspects of functions and tasks.



Prepared by: Authors

Management functions and tasks: conceptual diagram, broken down into functions and tasks.



Prepared by: The authors

SOLVED QUESTIONNAIRE

1. What is the difference between leader and entrepreneur?

Leader: Leader is a person who guides or leads a company or organization.

Entrepreneur: The entrepreneur is a dreamer who fulfills all the dreams he has and fights every day for a better life.

2. What is the role of a leader in a company?

A leader plans, delegates tasks and achieves goals or objectives. A leader is a person who leads a group, organization or country.

3. About the five basic functions of management. What is the difference between planning and organizing?

To plan: It must begin by considering what it is that you want to do, how it is going to be achieved and what is needed for it.

To organize: It is to start searching, compiling, buying all the necessary resources to carry out a defined plan.

4. What is the management function?

It consists of making the plan work; is to give the orders so that the planned activities are carried out.

5. What is the main purpose of control?

Its immediate purpose is to measure, qualitatively and quantitatively the performance in relation to performance patterns.

6. According to Vélez Bedoya Á. R, (2007), how is “administration as management” defined?

Administration as management is defined as the set of activities of planning, organizing coordination, direction and control.

7. What are the tasks of management?

Directing a business, Directing Managers, Directing the worker in his work.

Run a business, Direct Managers, actions, jobs or activities.

Running a business, Work with percentages, shares, jobs or activities.

Prioritize Tasks, Work with percentages, actions, jobs or activities.

8. Complete the definition of management

Specific body- management decision

Management is the of a trading company. Whenever we talk about the decision of a company, to build a new factory, lay off workers or treat its customers honestly, we are actually talking about an act of management, of a management conduct.

9. What are the essential aspects of running a business?

Elements and requirements can be analyzed, systematically organized, and are learnable

Items can be analyzed, systematically organized, and are learnable

Items can be performed, systematically organized, and are learnable

Elements and requirements can be experimented with, can be systematically executed, and can be learned.

10. When considering the human being as a resource, which properties are possessed?

Physiological, peculiar, capacities and limitations that require planning and attention

Knowledge, discipline, abilities and limitations that require planning and attention

Intellectual, peculiar, capacities and limitations that require planning and attention

Capacities and limitations that require planning and attention like the properties of any other resource

2.4 THE BUSINESS AND ITS OBJECTIVES

2.4.1 Definition of authors

Opening a business is a dream come true for many entrepreneurs, but it also involves risks. Its success is the fruit of a reasonable administration that the entrepreneur has to learn in one way or another.

Everyone wants to be successful and put their tools to reach their goals. But every day there are businesses that fail despite all the goodwill of their owners.

A business is an activity, occupation, system or method that aims to obtain an economic benefit, generally through the performance of activities of production of products, commercialization of products or provision of services, which benefit people or other businesses.(Lao Sudea, 2017)

The creation of a company essentially results from the combination of two factors: a person or team of people and a business idea; It is known that people do not in all cases give in to the business idea to be developed, but what they do, without a doubt, is decide to develop it. From this situation, what we call the entrepreneurial process, begins.(Dominguez Bocanegra, 2019)

To define the business objectives, the following should be considered:

- They should be clear and simple
- They must be measurable to know at any time if progress has been made
- They must be realistic
- They must be limited in time
- They must be constantly reviewed

It is the consequence of the correct administration of the “Resources” with an economically positive result for the parties. This result can not only be money but power relations.(Publishing, 2007)

A business is nothing more than providing a solution to a need.(Soria Ibanez, 2017)

It consists of detailing the information of the business focusing on the clients that it is intended to serve and the type of products and services that it will offer.

The income of the business will come from the customers and if their needs are not met, the business is sure to fail.(Pedraza Rendon, 2015)

In general, there are three components that define the business.

- The needs of the consumer, what is offered? (Offer).
- Consumer groups, who do you sell to? (Demand).
- The technologies to be used and the functions to be performed, why is the company chosen? (Competitive advantage.)

2.4.2 OBJECTIVES OF A COMPANY

2.4.2.1 According to hierarchy

Strategic: these are generic objectives that a company seeks to achieve in the long term (5 to 10 years), also known as general objectives. They are closely aligned with the mission and vision of the business. after all, they are the ones that guide the direction of the project. But beware of setting too many strategic objectives at the same time. When addressing them, there is a risk of going in opposite directions, weakening resources and results.

Tactical: These are those framed in the different departments that support and feed the strategic objectives. They are usually established in the medium term (2 to 5 years).

Operational: at this level, *objectives* are taken to a *more operational level*. They must be *specific*, *often for each employee*, short term (less than *one year*) and *easier to achieve*.

2.4.2.2. SMART OBJECTIVES IN A COMPANY

SMART objectives is a way of approaching the achievement of a company's goals in order to anticipate difficulties and improve the chances of success.

Y: (Specific) It is specific and concrete. That is, anyone to whom the information is shared must be able to understand it.

M: It has to be measurable and quantifiable to be able to evaluate it objectively. We are talking about numbers, metrics in spreadsheets or universal measures that allow us to avoid the famous “a lot, a little, more or less, etc”.

to: (achievable) The objective must be possible to achieve, that is, being demanding and ambitious, we must keep our feet on the ground and be willing to modify it in case we have been too optimistic.

A: (Realistic) Closely related to the above, we must be realistic when defining objectives. Above all, taking into account resources, skills and motivation.

T: (Time) It is framed in a temporary framework, otherwise the objective is dilated so much in time that it ends up losing perspective, the ability to be evaluated and its function.

2.4.3 BUSINESS PLAN

The business plan is the guide of how the business will operate to meet the objectives expressed in the short, medium and long term, specifying in its technical, economic and financial viability to carry out the project. Those involved in the project will know what they have to do, where, when, why and with whom.

According to the contextualization of the business and its objectives, these are essential to promote economic growth, generate revenue and create value for customers and society in general. In addition, setting clear objectives allows you to steer actions in a certain direction and measure the company's performance.

In conclusion:

The business arises thanks to the creativity, invention and innovation that a group or a single person has in order to generate income through a work activity.

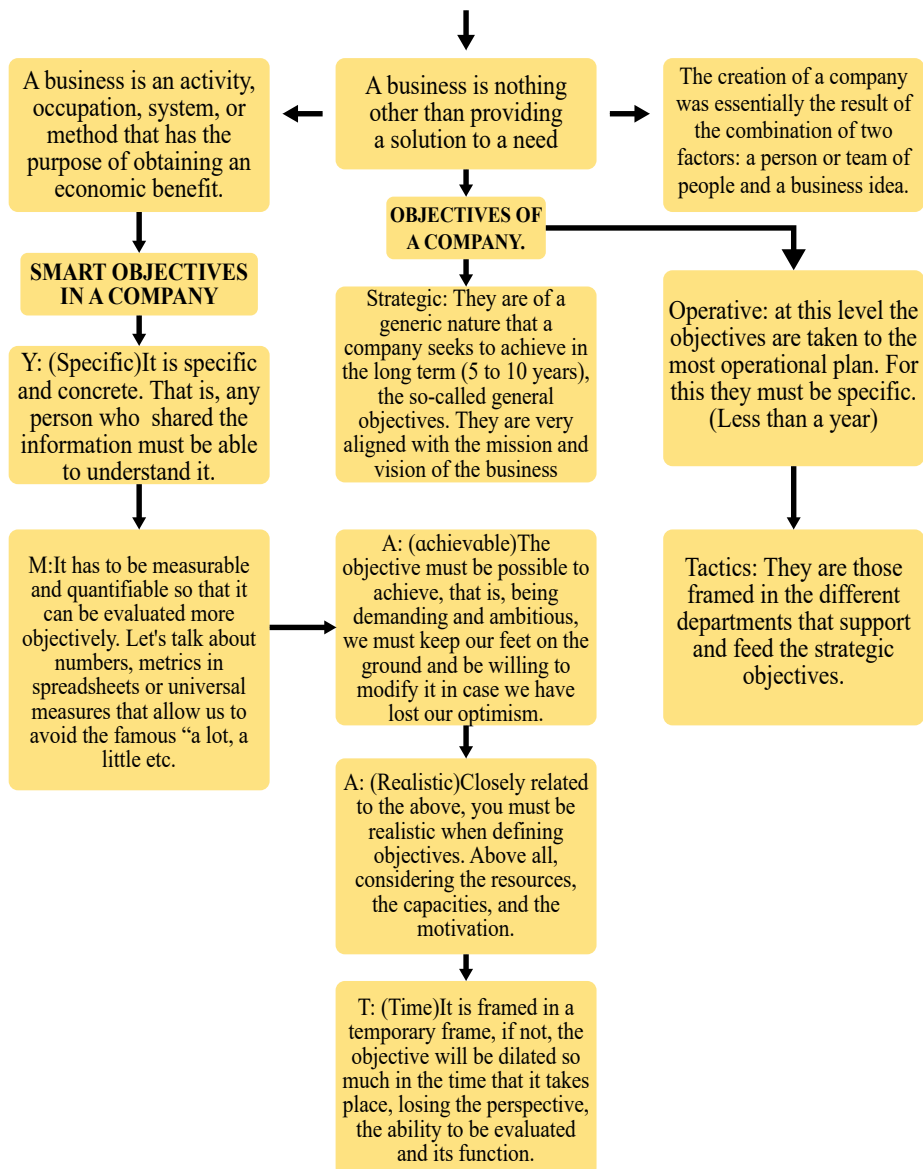
A business is an economic activity that carries out the various procedures of production, distribution and sale or exchange of services and goods, to satisfy the needs of consumers.

A business is an entity created in order to obtain an economic benefit, generally through the performance of activities of production of products, commercialization of products or provision of services, which benefit people or other businesses.

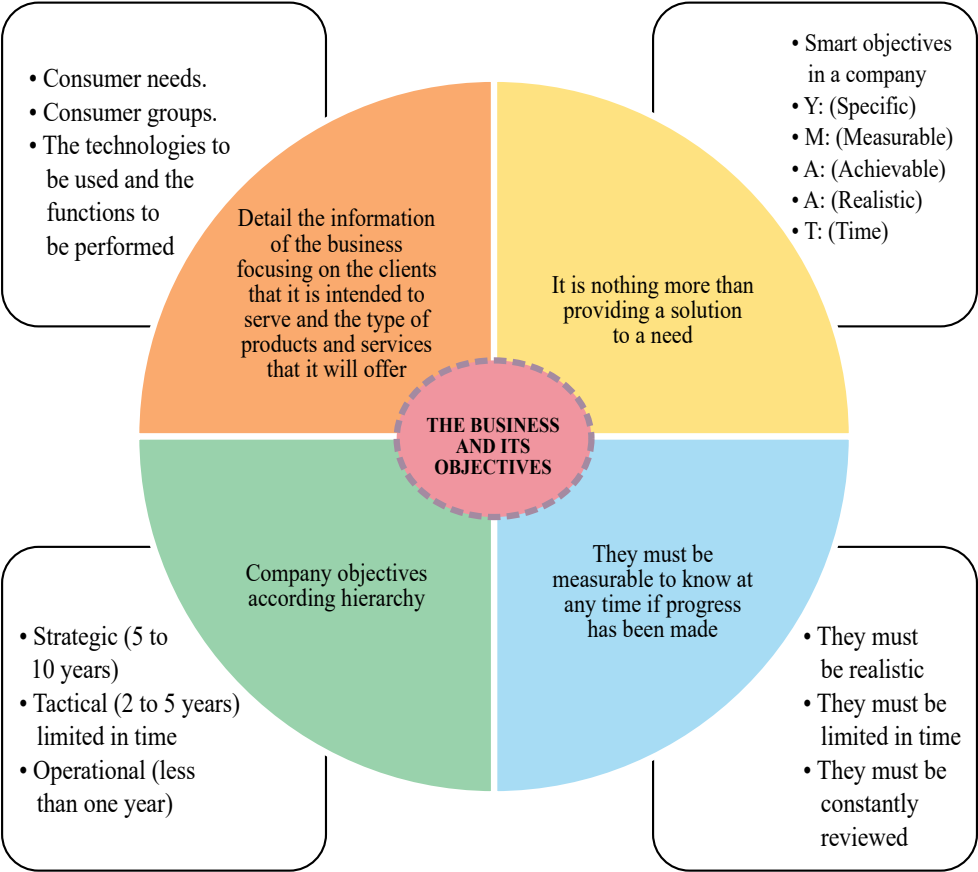
Graphic organizers

The business and its objectives: circular diagram, broken down into general aspects, objectives and key words.

THE BUSINESS AND ITS OBJECTIVES

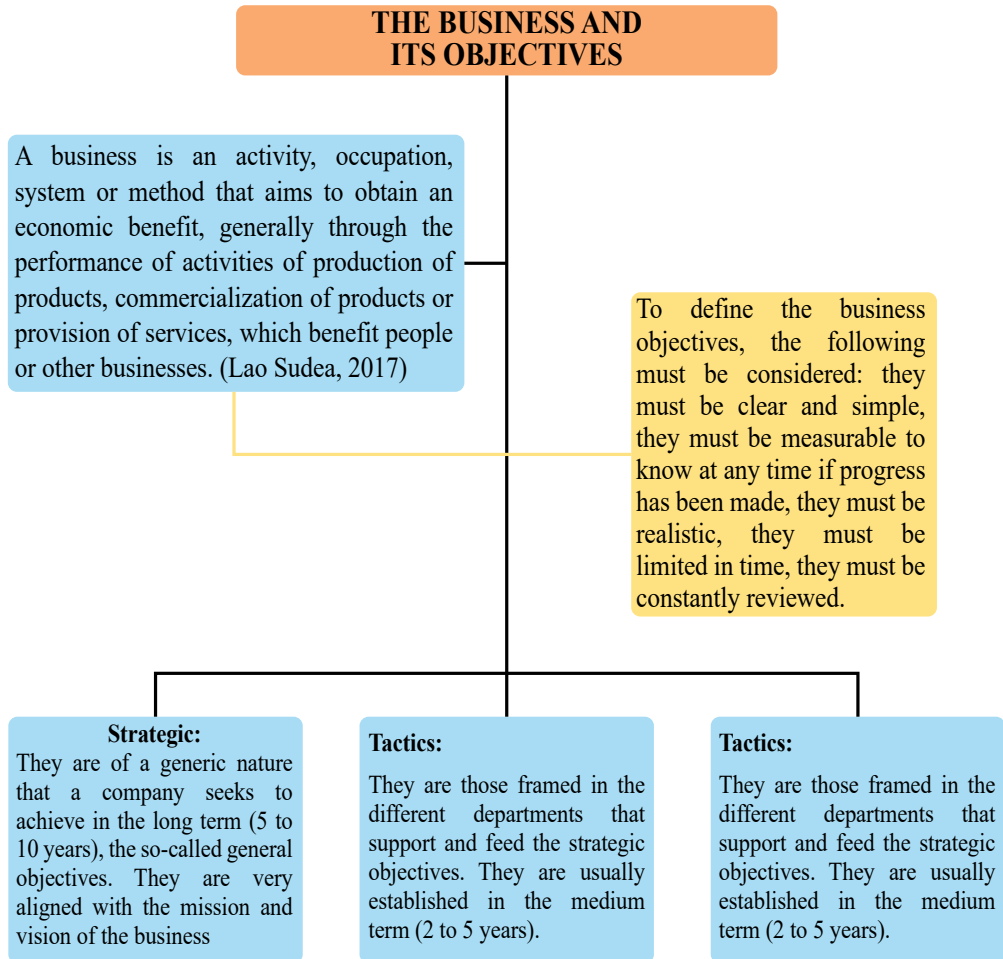


The business and its objectives: circular diagram, broken down into general aspects, objectives and key words.



Prepared by: The authors

The Business and its objectives: conceptual diagram, broken down into conceptual aspects.



Prepared by: The authors

SOLVED QUESTIONNAIRE

1. How does Laos Sudea, (2017) define a business?

A business is an activity, occupation, system or method that has as its purpose of obtaining an economic benefit, generally through the performance of activities of production of products, commercialization of products or provision of services, which benefit people or other businesses.

2. What factors are essential for the creation of a company?

A person or team of people and a business idea.

3. What are the three components that define the business?

- Consumer needs.
- Consumer groups.
- The technologies to be used and the functions to be performed.

4. Mention the objectives of a company according to its hierarchy and its established deadlines.

- Strategic (5 to 10 years)
- Tactical (2 to 5 years).
- Operational: (less than a year)

5. Select an example of a strategic objective

- a) Implement visual merchandising techniques
- b) Increase market share by 25%
- c) Acquisition of machinery **More modern**
- d) None of the above

COMPLETE

6. According to Publishing 2007, a business “is the consequence of the correct administration of the _____ with an economically positive

result for the parties. This result can not only be _____ but _____

a) Resources, feasible, **realizable**.

b) Resources, money, power relations.

c) Inputs and money, correct, **feasible to invest**.

d) Inputs and expenses, economic, economically positive, appealing to investors.

7. According to Domínguez Boncanegra, 2019 How should the objectives be set?

- They must be limited in time.
- They must be summarized
- They must be constantly verified
- They must be evaluated to know at each moment if progress has been made.

8. Define what are tactical objectives?

They are those framed in the different departments that support and feed the strategic objectives.

9. What are the Smart objectives of a company?

- Y: (Specific)
- W: (Measurable)
- to: (achievable)
- A: (Realistic)
- T: (Time)

10. What should be taken into account when making a Smart (achievable) goal?

The objective must be possible to achieve, that is, being demanding and ambitious, we must keep our feet on the ground and be willing to modify it in case we have been too optimistic.

2.5 BUSINESS LEADERSHIP

Author definitions

Business leader. It is the person who has managed to carry out different business projects, carrying them out effectively and accurately, standing out among other entrepreneurs and becoming taken into account by others for various businesses, understanding from this that he is a person who inspires others, and influences them. Also included are those who within a company possess skills and qualities that make them influence others, such as listening to the opinions and suggestions of those below them in the hierarchy, knowing how to run the company and guiding subordinates in their work in such a way that effectiveness is achieved in achieving an end. (Ruiz, 2017)

Types of leaders according to the way of exercising leadership.

Spontaneous leader. It is the leader that arises spontaneously when a certain situation or problem arises, assuming command of the actions to be carried out, giving instructions and coordinating the necessary actions to bring them to a good end.

Traditional leader. It is the leader who obtains power by holding a position or by belonging to a group of power established long ago; This is the case that usually occurs in monarchies and family businesses, in which leadership is inherited to one member (generally the first-born), regardless of whether or not the individual in question possesses the necessary qualities to direct and lead his subordinates.

Authoritarian leader. It is the one who makes decisions authoritatively, without asking other people for advice or giving explanations about their actions and decisions; Although sometimes his decisions are correct, they usually err on the right path to achieve actions aimed at a precise goal, since being authoritarian they ignore and waste the opinions and suggestions of their subordinates.

Democratic leader. It is the leader who makes decisions after consulting others, and poses problems accepting the opinions and advice of others to make decisions.

Other types of leadership to consider are:

1. Autocratic leadership. It is exercised through an imposed leader, who conducts himself by establishing rules in a dictatorial manner. Recent and current examples are Hugo Chavez and Fidel Castro.
2. Communicational leadership. It is in which reciprocal communication is established between the leader and his subordinates.
3. Manipulative leadership. He does not impose himself or give orders, he tries to always be on good terms with his subordinates and allows them everything, but he exercises leadership by moving masses through manipulation. Here we must consider the way populist governments act.

Benefits of business leadership

- Employee Motivation
- Productivity increase.
- Improves the work environment and teamwork.
- Revenue and profit growth.
- Improves the brand image both inside and outside the company

According to Cadena, (2018) it does not say that having the ability to coordinate activities towards the proposed objectives not only initiates the actions, but directs them, follows up and recognizes the achievements of the people who are part of his team.

Transcendent business leadership involves not only leadership in terms of our work teams, but also calls for business leadership; For this reason, management practices are established to take our companies to positions of market leadership, with adequate levels of business profitability, since, without this, the very reason for corporate existence is lost. (Rabouin, 2017)

Leadership is the process of influencing other people to gain their understanding and consensus about the necessary actions and measures in a given situation, and the process of facilitating individual and collective efforts to achieve common goals. (Yuki, 2008)

The leader's areas of influence:

1. The choice of objectives or strategies
2. Motivation of group members to achieve goals
3. Mutual trust and cooperation of group members
4. The organization and coordination of work activities
5. The allocation of resources to activities or objectives
6. Developing group skills and trust
7. Learning and sharing of new knowledge by group members
8. The inclusion of external support and cooperation
9. The design of formal structures, programs or systems
10. Beliefs and values shared by group members

Leadership is understood as a complex social process through which an individual manages to have a high degree of influence in a group, either to transform it or to mobilize it towards the fulfillment of certain objectives (Martinez, 2010).

In relation to the above, it is established that business leadership is fundamental for the success of an organization. By motivating teams, making the right decisions, communicating effectively and managing change appropriately, managers can positively influence productivity, efficiency and innovation in a company. In addition, creating a stable organizational culture is the key to preserving talent and ensuring sustainable growth.

In conclusion:

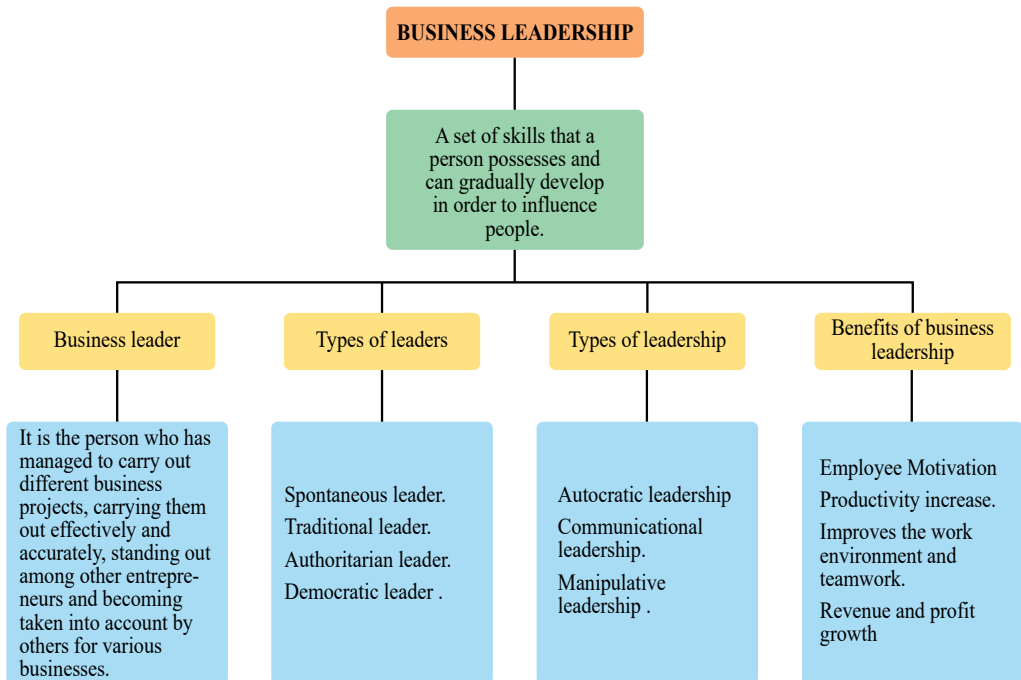
Business leadership is a skill that all people have and can develop. Leadership goes beyond imposing orders, is motivating a group to work for which the company or department leader is able to influence workers to achieve goals.

Business leadership can be understood as a set of skills that a person has within a company so that, together with the work group, they have optimal performance and are able to meet the proposed objectives.

Business leadership is the ability that a person possesses to be able to guide and encourage workers to obtain maximum performance from them for the company.

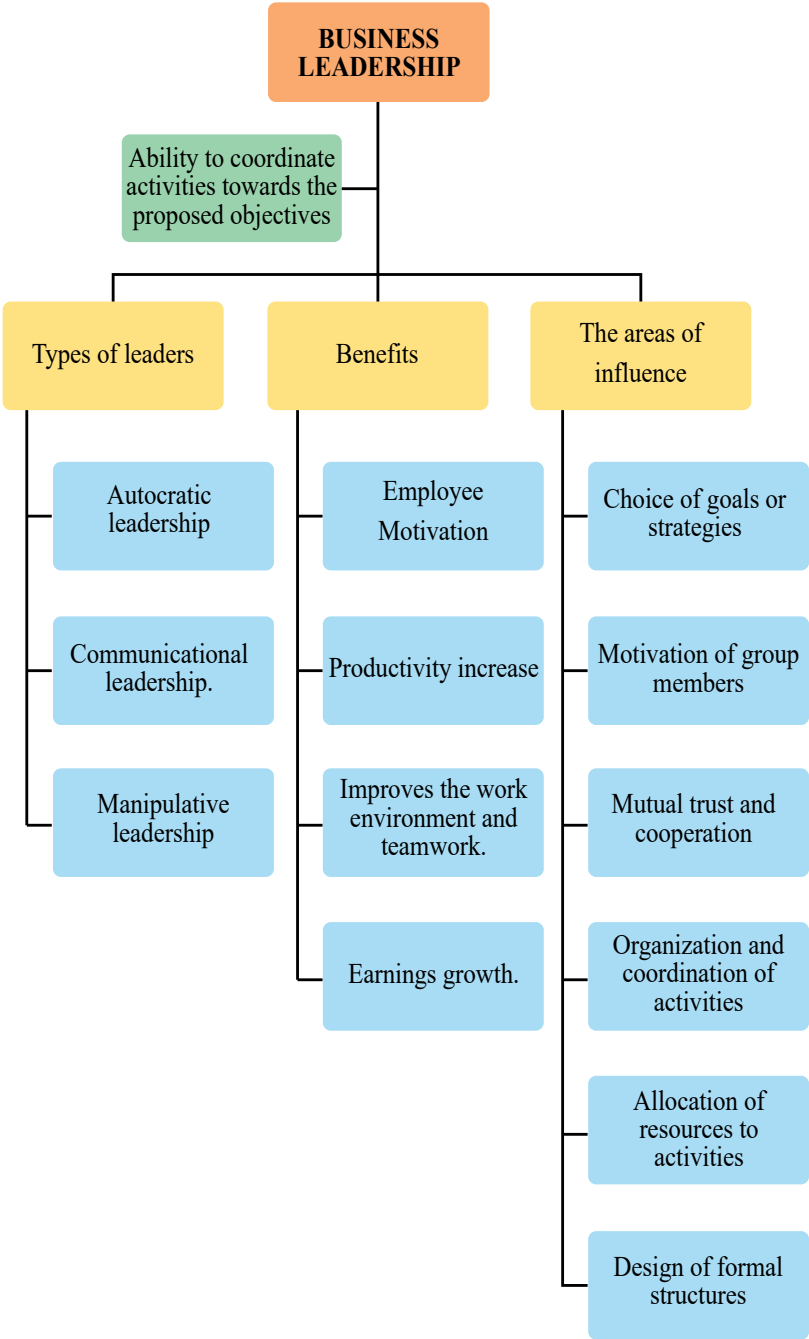
Graphic organizers

Business leadership: conceptual diagram, broken down into conceptual aspects, time subdivision and other aspects.



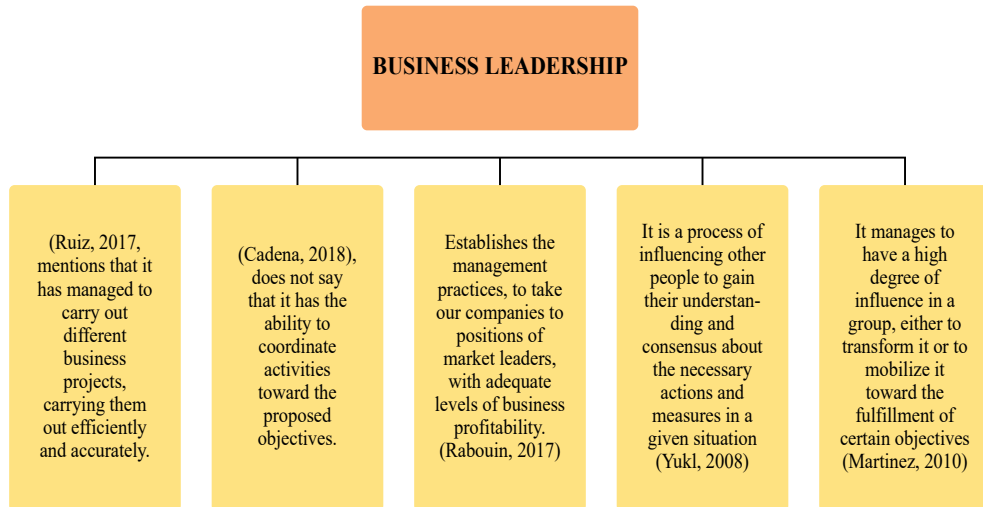
Prepared by: The authors

Business leadership: conceptual diagram, broken down into conceptual aspects, subdivision of leadership times, benefits and areas of influence.



Prepared by: The authors

Business leadership: conceptual diagram, broken down into conceptual aspects.



Prepared by: The authors

SOLVED QUESTIONNAIRE

1. According to Martínez, (2010) the areas of influence of a leader are 10.

I mentioned 3 of them:

1. Learning and sharing of new knowledge by group members
2. The inclusion of external support and cooperation
3. The design of formal structures, programs or systems

2. How to ensure that the company's objectives are met by the employees?

- Creating continuous evaluations
- Achievable goal
- Bonus incentives for achieving goals
- Company culture

3. What will be the consequences of applying bad leadership in a certain company?

- Employee demotivation.
- Decreased productivity.
- Bad work environment and teamwork.

4. How can a leader fail?

Strict hierarchies

Actions before the dialogue

Leadership no, workers yes

Wrong expectations about the boss

5. Yukl, (2008) mentions that business leadership is;

The process of influencing other people to gain their understanding and consensus about the necessary actions and measures in a given situation, and the process of facilitating individual and collective efforts to achieve common goals.

6. Is it possible for anyone to be a leader?

Anyone who has the desire to achieve a goal can become a leader, although there are no perfect leaders, we all have a few unhealthy traits.

7. How is autocratic leadership applied to a company?

By means of an imposed leader, who conducts himself by establishing rules in a dictatorial manner. Recent examples are Hugo Chavez and Fidel Castro.

8. Are leaders born or made?

There are leaders who are born having in their genes the ease of communicating and interacting with other people from an early age, but the answer is that they do not necessarily have to be born. Over time, anyone can develop various skills that make them a good leader.

9. When does a spontaneous leader emerge?

A spontaneous leader emerges when a certain situation or problem arises. When a person assumes the role of leader and takes command of the actions to be carried out, giving instructions and coordinating the necessary actions to carry them out successfully.

10. Name one area that can be influenced by a leader and in what way?

The leader can influence the choice of objectives or strategies since they are the ones who are in charge of the company and mainly of a group. They must set objectives and make their team know that they have an idea of what they want to achieve. In turn, comply with the strategies that they take into account will be discussed with the team members for good decision-making.

2.6 ETHICS AND BUSINESS LEADERSHIP

Authors' Definitions of ethics

According to Torres, (2014) Ethics is a body of knowledge that addresses the nature of human actions in social life, from the perspective of moral concepts (goodness, truth) and moral precepts (reciprocity).

According to Vieira, (2015) Ethics is the criterion that we use to establish a hierarchy of value between our actions... to establish what is the best way of living.

“Ethics is the science that studies human acts and their morality, that is, their reference to the ultimate goal of man.” (Garcia, Chavez, Ruiz, & Belmares, 1985)

In conclusion, it can be stated that ethics are:

Ethics is a science and discipline that has an emotional character, its main function lies in the problems of the human being, since morality varies in each human being to make the best decision.

Ethics is the ability of a person to make the decision that they consider correct in a given circumstance, taking into account the general well-being above their own interest.

Business Leadership, Authors' Definitions

According to the author Martínez Guillén, (2012) Leadership is understood as the process of influencing the activities carried out by a person or group to achieve a goal.

“Leadership is understood as the set of orientations of person’s character that configure a way of being, thinking, feeling and acting that allows an individual to influence the behavior of other people to jointly build the future of the world”. (Martinez Herrera, 2010)

“The leader’s task is to ensure that individuals or groups are competent to exercise the responsibility assigned to them, to understand the objectives of the organization and to commit to them.” (Rabouin, 2017)

In conclusion, it can be stated that business leadership is:

Leadership is a process through which a person influences the behavior of others to achieve the proposed objectives.

Business leadership means the will to change the world. The company’s mission is to fully develop the capabilities of its employees to fulfill the responsibility for the development of society,

To become an effective leader it is necessary to have a leadership attitude to which you must add your leadership skills and constantly perfect, refine and polish your knowledge, skills and attitudes. (Ruiz-Speare, 2017)

The skills needed for effective leadership are:

- Curiosity
- Know how to listen
- Art of asking
- Leadership style
- Personal integrity
- Imagination
- Authority

- Capacity to make decisions
- Learn to reinforce
- Enthusiasm
- Self-satisfaction
- Emotional intelligence
- Emotional strength

Types of leaders according to the way of exercising leadership as defined by the author (Ruiz Speare, 2017)

Spontaneous leader. It is the leader who emerges spontaneously when a certain situation or problem arises, taking command of the actions to be taken, giving instructions and coordinating the necessary actions to bring them to a successful conclusion.

Traditional leader. It is the leader who obtains power by holding a position or belonging to an established power group; this is usually the case in monarchies and family businesses, in which leadership is inherited to one member (usually the firstborn).

Authoritarian leader. It is the person who makes decisions in an authoritarian manner, without asking for advice from other people or giving explanations about his actions and decisions; although sometimes his decisions are correct, he usually errs in the right way to achieve the actions aimed at a precise end. Being authoritarian makes him ignore and waste the opinions and suggestions of his subordinates.

Democratic leader. It is the leader who makes decisions after consulting others, and poses problems accepting the opinions and advice of others to make decisions.

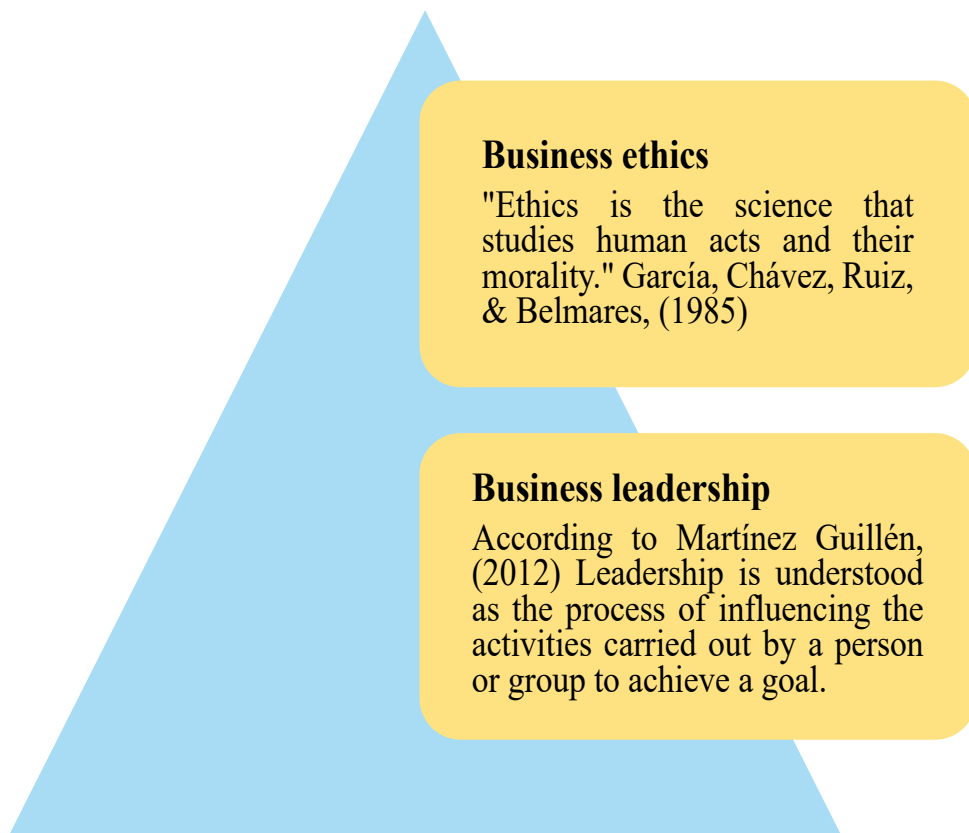
Liberal leader. It is the leader who delegates some decisions to others, thus allowing them to enhance the capabilities of each member of the group.

Charismatic leader. These leaders have a personality and charisma that influence some people and even inspire them; they are people who usually have a very high self-confidence and “infect” it in a certain way, to others.

In short, combining ethics and business leadership is critical to building trust, enhancing reputation, inspiring others and fostering a positive work environment. It also fosters more informed and balanced decision making that takes into account moral issues critical to an organization's sustainable success.

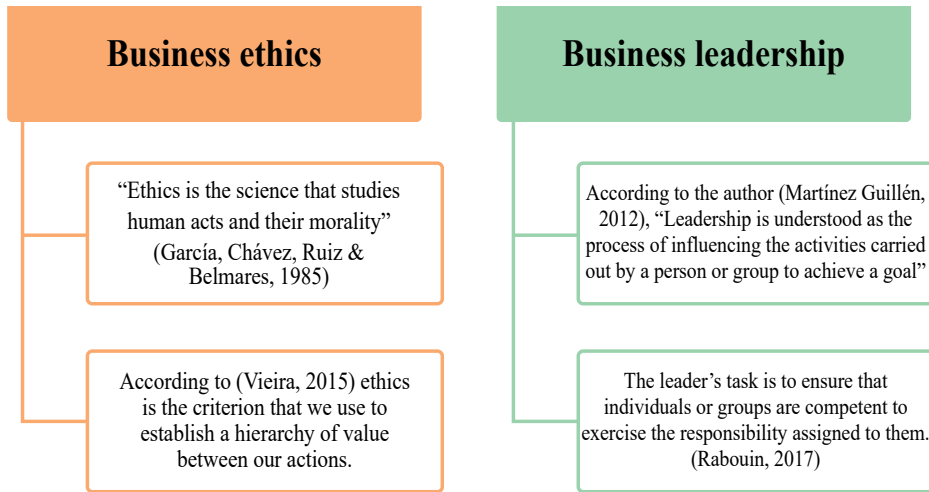
Graphic organizers

Business ethics: conceptual diagram, broken down into conceptual aspects.



Prepared by: The authors

Business ethics and business leadership: conceptual diagram.



Produced by: The authors

Solved Questionnaire

1. Ethics is:

- a) The discipline that studies human behavior and its relationship with morality
- b) The discipline that studies human evolution
- c) The discipline that studies religion
- d) A Term related to theology

2. Select the options that represent ethics

- a) Moral
- b) Transparency
- c) Punctuality
- d) Serenity

3. Determine if the following concept is true or false “Ethics studies the behavior of the human being and its relationship with morality to make good decisions”

a) Real

b) Fake

4. What factors does ethics analyze?

a) Injustice

b) Justice

c) Love

d) Moral precepts

5. Complete the following concept, “ethics is a branch that studies the and is related to the And from a social group”

a) Philosophical

b) Moral

c) Rules

d) Customs

6. What is leadership? according to Martínez Herrera, (2010)?

Leadership is understood as the set of orientations of a person's character that configure a way of being, thinking, feeling and acting that allows an individual to influence the behavior of other people to jointly build the future of the world.

7. What is good leadership attitude?

To become an effective leader it is necessary to have a leadership attitude to which you must add your leadership skills and constantly perfect, refine and polish your knowledge, skills and attitudes.

8. Select the correct answer

According to the author Ruiz Speare (2017) What types of leaders does the way of exercising leadership mention?

a) Spontaneous leader, traditional leader, authoritarian leader, demo-

cratic leader, liberal leader, charismatic leader.

b) Spontaneous leader, traditional leader, authoritarian leader, political leader

c) Spontaneous leader, traditional leader, self-critical leader

9. True or false

Effective leaders are those who can adapt their behavior in order to respond in a modulated way to the complexity of each situation.

a) Real

b) Fake

10. Name three skills necessary for effective leadership?

- Know how to listen
- Personal integrity
- Capacity to make decisions

2.7 BUSINESS LEADERSHIP IN TIME OF CHANGE

Author definitions

Lazzati, SC and Tailhade, M. (2019)

“The Process by which one person influences others to move towards the achievement of common goals. Leadership depends on the attributes of the leader, but its exercise implies a relationship between the leader and the led, which also depends on the predisposition of the led and the conditions of the situation.

Ramos Ramos, P. Coord, (2016)

“Interpersonal influence, directed through the communication process, to the achievement of one or more goals. Leadership involves the use of influence, being an agent of change, being able to affect the behavior and performance of group members, and meeting individual, group, or organizational goals.

Dawn, (2015)

“Business leadership is based on knowing how to run the company itself, or manage within a company, it is proven that an authoritarian boss full of superiority that instills fear does not work, since it only creates suspicion and discontent in the collaborators. So at this time it is necessary to have a leader as a guide and counselor who helps overcome difficulties and is capable of motivating the staff.”

R. Rabouin, (2017)

“When we talk about the leader as a coach, we refer to the permanent training activity that the leader must do with his collaborators; the leader must assume that his primary activity is the development of his collaborators, since this is the surest way that, on the one hand, a relationship of extreme trust is generated and, from it, leadership can be built genuinely. “

Elmore, RF, (2010)

Leadership “is essentially about creating, nurturing, and developing the capacity of teachers and students to engage in good learning.”

2.8 BUSINESS LEADERSHIP IN TIME OF CHANGE

Yukl, G. (2008), states that the leadership of change is one of the most difficult and important responsibilities of leadership. In other words, it is the essence of leadership. In addition, effective leadership is necessary to revitalize an organization and promote adaptation in a changing environment. Likewise, one of the most important and difficult responsibilities of leadership is to guide and favor, with a clear and attractive vision, the process of making an important change in an organization.

On the other hand, Martínez Guillén (2012), mentions that business leadership in times of change consists of managing positively and effectively the processes of adaptation and transformation, managers must reach high levels of efficiency in their management qualities, in their ability to make decisions, in their levels of productivity and on their personal efficiency.

According to Fernández, (2008), regarding business leadership, Sun Tsu’s management model provides the keys to managing organizations in an environment subject to rapid change. The model is based on four points:

- Unity of purpose: "The company whose directors and employees are united by a common purpose will achieve success."
- Knowledge of the environment: "Just as water in its flow adapts to the shape of the land, the company must adapt to its environment to be successful".
- Capable leadership: "The leader is the center around which the company gravitates. If the leader is competent, the company will prosper; if he is incompetent, it will be chaos."
- Effective Organization: "It is a good organization that manages to manage a company with few employees as well as another with many."

In summary, business leadership plays a vital role in times of change by providing strategic direction, managing change effectively, fostering adaptability and innovation, keeping teams motivated and managing talent appropriately. Given the ever-changing challenges of today's business environment, a good leader can make or break an organization in these uncertain times.

In conclusion, it can be stated:

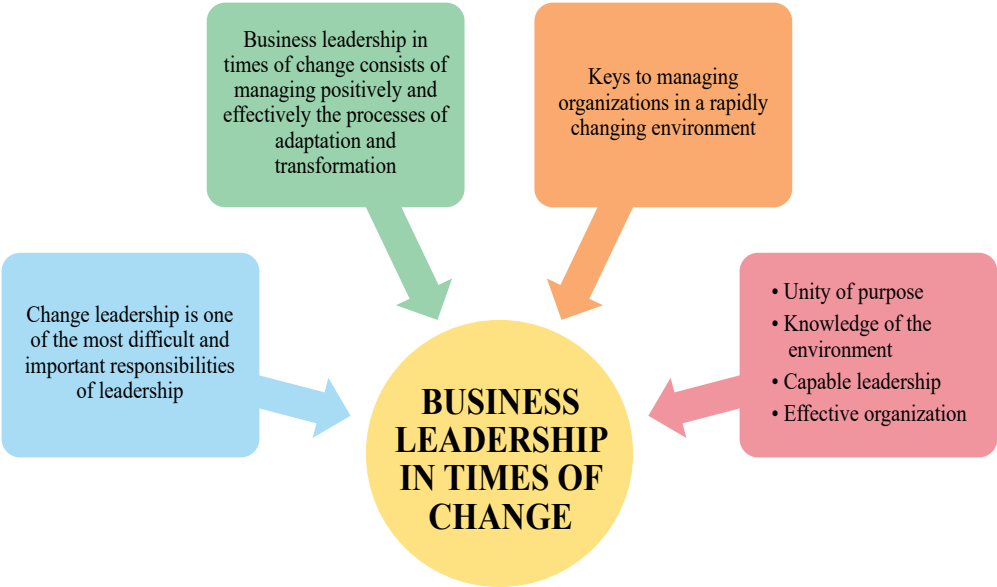
Business leadership in times of change is an ability that a person possesses to influence the workers of an organization in a positive way, helping them to adapt to the changes that arise and to achieve goals and objectives.

Business leadership in times of change is the art used by a person or an entity to be able to guide their team towards the goal, the leader must recognize the abilities of their peers and encourage them to achieve the established objectives in a certain period of time, the leader evolves at the same time as the environment that surrounds him.

Business leadership in times of change is the ability to effectively and assertively manage and direct a team, to deal with the changes and transformations that occur on the way to fulfilling the organization's objectives.

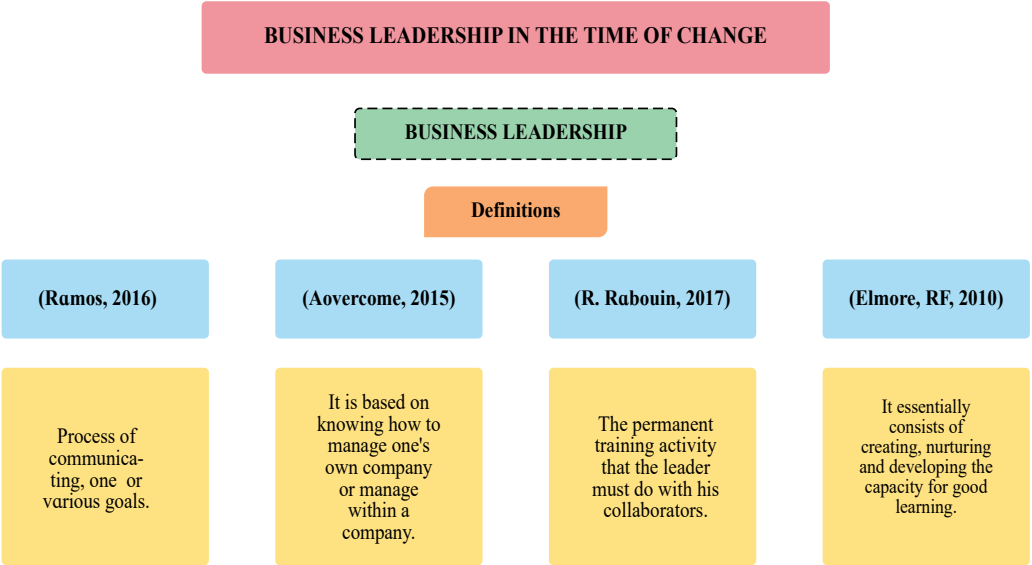
Graphic organizers

Business leadership in times of change: pie chart, broken down into conceptual aspects.



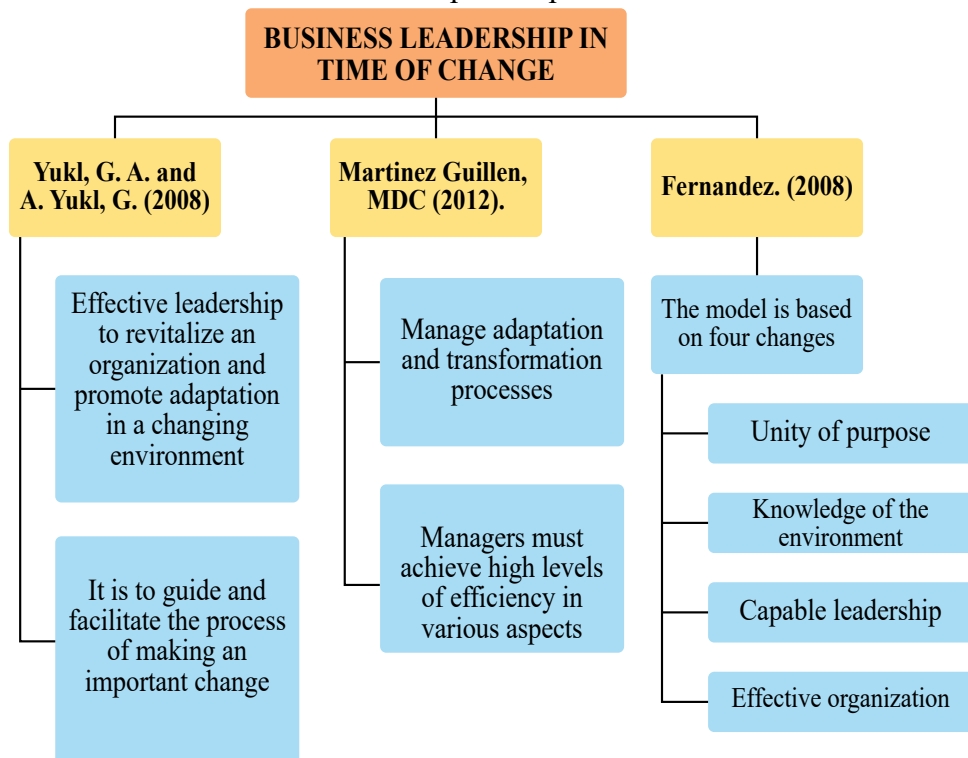
Prepared by: The authors

Business leadership in times of change: conceptual diagram, broken down into conceptual aspects.



Prepared by: The authors

Business leadership in times of change: conceptual diagram, broken down into conceptual aspects.



Prepared by: The authors

Solved Questionnaire

1. The phrase: “The company whose directors and employees are united by a common purpose will achieve success”, to which point of Sun Tzu’s model does it refer?

ANSWER: Unity of Purpose

2. According to (Elmore, RF, 2010) what does leadership consist of?

ANSWER: Essentially to create, nurture and develop the capacity of teachers and students to engage in good learning.

3. When we talk about the leader as a coach, we refer to:

ANSWER: The permanent training activity that the leader must do with his collaborators.

4. Faced with a health, economic and labor crisis, what should organizations do in terms of leadership?

Lead the recovery, create the right environment for businesses to drive economic growth and create jobs.

5. Leadership depends on two important aspects, explain each of them.

Leadership depends on the attributes that the leader has, his qualities. In the same way, the relationship between the leader and the led depends on the predisposition of the led and the conditions of the situation.

6. Through what process is leadership conducted?

Learning process

Influence process

Communication process

Trust process

7. What should be avoided for good leadership to work?

The leader must avoid being authoritarian, full of superiority, he must not instill fear in others, since this will only cause discontent in the collaborators.

EXAMPLE:

Apple

To become one of the world's most valuable brands, Apple stuck to its strategy of challenging the status quo. The "Think Different" campaign illustrates the company's power to create revolutionary products and conquer new global markets. Even after this success, Apple has not stopped innovating and remains convinced of the need to create new solutions and new technologies.

Airbnb

Airbnb has grown from a startup to one of the major powers in the global tourism market, thanks to a bold strategy. The company used the growth hacking

technique to reach a market value of 1 billion dollars, betting on building trust as the basis for the success of the shared accommodation service. In addition, it invested in a strong digital presence and a narrative strategy to communicate its differences (Velázquez, 2022).

CHAPTER III

DEVELOPMENT AND IMPLEMENTATION OF STRATEGY

3.1 STRATEGIC DESIGN

Definition of authors

Strategy is a key word for companies because it is considered as a series of detailed steps that are followed to achieve a certain goal, this would be the company's objectives, so it is important to design strategies that help the company's development.

According to Romero Rebolledo, J. and Espinoza Valdés, G. (2016). Strategic design is a multidisciplinary activity that incorporates human factors, knowledge, and techniques with the aim of increasing efficiency and productivity, improving working conditions and developing solutions directly linked to the company's customers.

In this context Huamán Pulgar-Vidal, L. and Rios Ramos, F. (2015) reveal that the strategic design consists of seeking advantages for the organization through its configuration of resources in a changing environment to meet the needs of the markets and meet the expectations of the interested parties considering economic, political, social, and competitiveness, among others.

Knowledge of the forces is key to identifying the opportunities for action that allow a company's capacity for innovation and competitiveness. As mentioned by Russell L, (1997) strategic design is an interrelated set of decisions before initiating an action, in a situation where it is believed that unless such action is undertaken, the desired future state is not probable and, the appropriate action is taken. Therefore, the probability of obtaining a favorable outcome will increase.

To Prieto, (2011) Strategic design is a broad and complex concept, which covers various and different disciplines, and which can be perceived and treated in different ways: as a process or as a result, as a way of adding value to compa-

nies, but what all the authors agree on is that it serves as an instrument to meet the stated objectives.

In short, strategic design is crucial in helping organizations set clear direction, make informed decisions, promote internal consistency and drive innovation. It also contributes to the development of sustainable strategies that enable responsible and successful growth in an increasingly competitive and changing business environment.

In conclusion, it can be stated:

It is the way in which new ways of facing the current panorama of a company are created through the analysis and study of various factors that allow the proper use of strategies through the efficient management of available resources in order to achieve growth and profitability of the company.

It is a set of actions that help companies meet their objectives, design strategies that increase sales, have visibility, make decisions betting on the future where opportunities are taken advantage of and weaknesses become strong.

In summary, internal strengths play a critical role in strategy development and help identify unique strengths, strategically guide the organization to achieve realistic objectives and foster a sustainable competitive advantage. They also provide valuable information for locating key resources and developing new capabilities needed to meet the challenges of a changing business environment.

3.2 INTERNAL FORCES

Marketing

To Sangri, (2015) Marketing is better understood when the relationships between the elements that compose it are studied, that is, it works as a whole, with harmony between all its areas. Said system integrates the knowledge of consumer needs, the design, production, storage, distribution and sale of the satisfier, consumer information, transaction collection and post-sale service; all of which results in the beginning of a new cycle to meet the requirements or needs of the consumer. Market research is the starting point of this cycle, since its objective is to identify what the consumer needs.

Finance and accounting

According to Morales, (2015) it is a set of laws, regulations, agencies and institutions that generate, capture, manage, guide and direct, both savings and investment, and financing within a legal framework of reference, in the political-economy offered by our country. likewise, it constitutes the great market where suppliers and demanders of monetary resources come into contact.

Production and operations

Set of elements (materials, human resources, machinery, procedures, information, supplies) organized and related to each other, in order to obtain a product or service. (Maseda, 2009)

Investigation and development

To Gaibor, (2015) Product research is a vital part of new product development. At all stages of the process, research can help identify key issues and avoid costly mistakes. Product research can be used initially to test new ideas.

Human talent

According to Reyes, (2019), human talent starts from managing with people who are seen as active and proactive agents endowed with manual, physical or artisan skills, as well as intelligence, creativity and intellectual abilities. People are not resources that the organization consumes and uses and that produce costs; on the contrary, people constitute a factor of competitiveness, in the same way as the market and technology.

Logistics

To Morales, (2015) The logistics system of a company can be outlined by a network, consisting of nodes and arcs (arrows). Similarly, we could consider a network of nodes and arcs to describe the logistics structure inside the factory.

Information system

To Cobarsi-Morales, J. (2011) discloses that it is the coordinated set of content and services based on digital and network technologies, that an organization makes available to people with internal and external interests in it. Therefore, facilitating the production and consumption of structured and selected sets of data, aimed at becoming valuable information for the activity of the organization.

Quality management

Pola Maseda, A. (2009) confirms that are functions of surveillance, control, detection, to fulfill a well-understood supervision function. That is, of help, advice, support to each of the company's workers so they can achieve the desired quality in the respective jobs to meet the needs and expectations of consumers based on a suitability for the use of the products or services.

3.3 EXTERNAL FORCES

Economic forces

Hernández Pérez, a. (2014), mentions that these factors help estimate the causes of success or failure of an economy, these are:

Production: refers to the level of production as a whole and the rate of growth rise. Production is measured by the gross domestic product (GDP) and this measures the value of the markets for goods and services that are produced in a country during a year.

Job: is the proportion of workers in the economy who are employed.

Inflation: is the increase in the average price of goods in the economy over time.

Social, cultural and demographic forces

It refers to the forces that affect the way people live, work or consume in the country where the company operates. (Gaibor, 2015)

Some of these forces are fertility rates, mortality rates and the aging of the population, the age structure, migrations, lifestyles, attitude towards work, social responsibility, etc.

Environmental forces

According to Vázquez, Labandeira, & León, (2007) economic growth gives rise to opposing effects on the natural environment. In the first place, the income per capita increase takes place from a greater consumption of raw materials and energy, therefore, more waste is generated and environmental problems worsen. On the other hand, the technological improvements and changes in preferences

that accompany economic growth may result in the relative environmental impacts of growth becoming smaller. There are different approaches depending on which group of effects is considered dominant.

Each country is in charge of preserving the environment in which it lives, for this purpose different laws are established to help comply with said establishment, which is governed mainly by companies that generate more toxic waste.

Political, legal and government forces

Political, legal and governmental forces directly influence the execution and approach of the organization's strategies. Each decision issued by governments and administrators directly affects companies and therefore the sectors that surround them, as Soriano & Torrents, (2015) established in their book "Economy of the company"

Environmental forces represent a great responsibility for a country or a company, since through this the growth and development of each individual residing in said place will be defined, or in the case of a company that works in that place in order to reach a point of balance that allows them to survive.

Technological forces

Cegarra, (2012) defines Technology as the set of knowledge typical of an industrial art, which allows the creation of artifacts or processes to produce them. Each technology has its own exclusive and technical language, so that the elements that compose it are perfectly defined, in accordance with the lexicon adopted for the specific technology.

Globalization is part of the technological forces, the internet is the economic engine of this since it helps productivity and is considered an important factor in the ability of a country to improve its living conditions.

Competitive forces

Becerra, (2018) defines competitiveness as an exercise in which the entire society participate such as, government, productive sectors, society in general. The term "Competitiveness" is currently widely used by companies and globally by countries, which measure the competitive position of their nations through indices in order to establish a range with which differences between economies are marked according to sectors, industry and company sizes.

In such a changing market, it is essential to stay on the sidelines, thanks to technology and globalization it is possible to know some of the wishes of consumers in order to reach them. This is not the only thing that should be known but also the way in which they should be treated. Today, the customer has the opportunity to buy where he wants and by any means he chooses as companies need to attract the consumer and not let him go easily because it represents a risk and loss for the company.

In short, external forces play a critical role in strategic design, providing valuable information about the business environment and revealing organizational opportunities or obstacles. They help you make informed decisions, seize opportunities, address threats and stay ahead in today's ever-changing business environment. They also foster innovation and growth by encouraging creative and adaptive responses to changing external forces.

In conclusion, it can be stated:

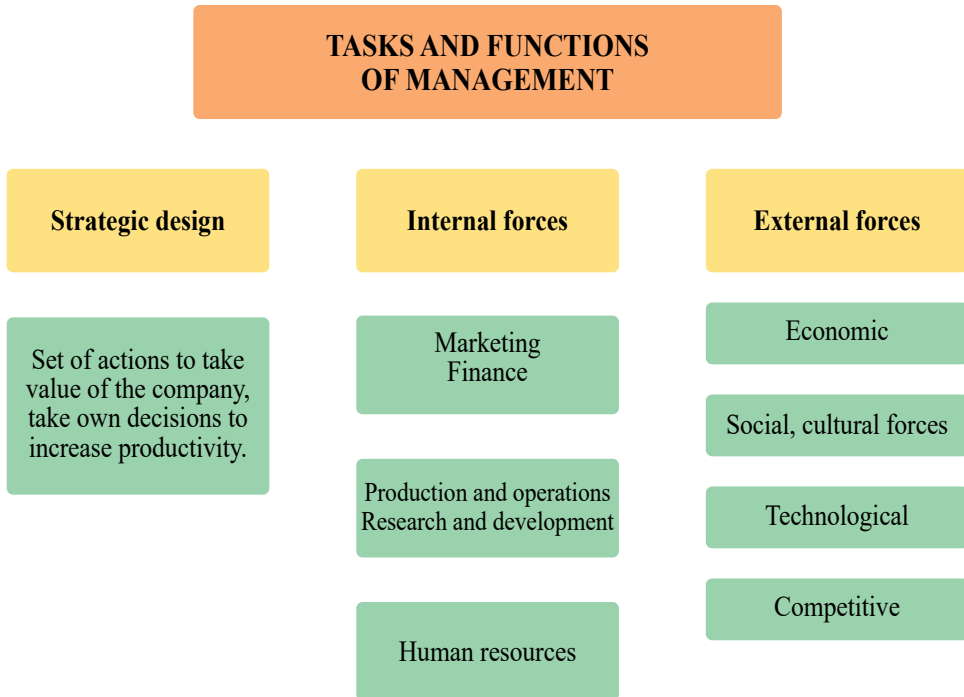
Within the exposed analysis it is possible to indicate that strategic design is a process carried out through research that provides the necessary information to generate innovative proposals that allow facing setbacks that often appear unexpectedly in the business world.

In this way, the purpose of strategic design is to help the company create new opportunities from situations that frequently occur in the environment in which it operates, optimizing resources and obtaining results either in the short or long term.

In order to ensure that the country develops upwards, companies must be sure of the laws and regulations that will be governed within it, because if these are not defined in a good way, they could represent a threat. However, the fact that there are appropriate regulations for business development does not mean that this is always the case, since the laws can change.

Graphic organizers

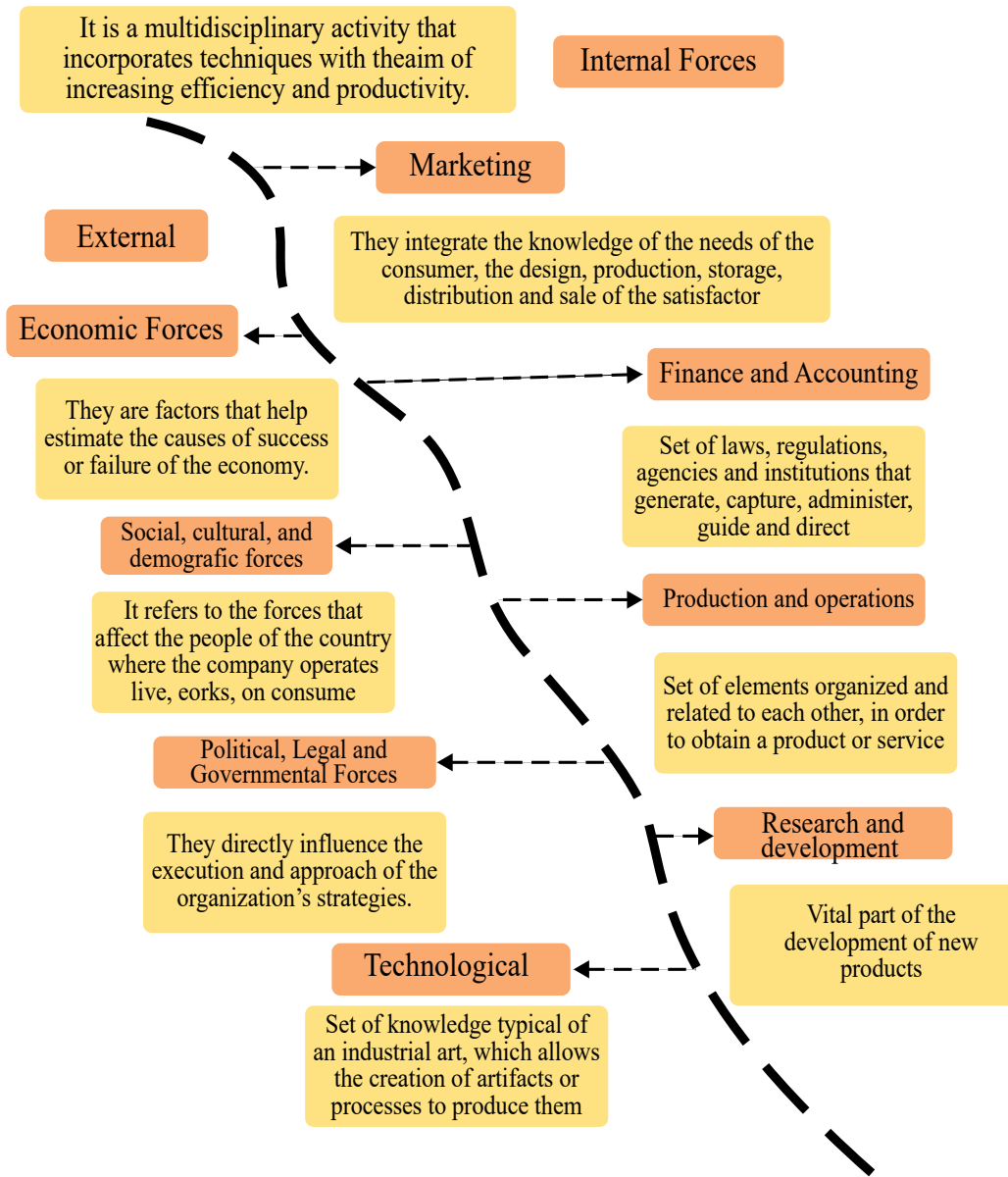
Management tasks and functions: conceptual diagram, broken down into conceptual aspects, key words, and subdivision of the design, and internal and external forces.



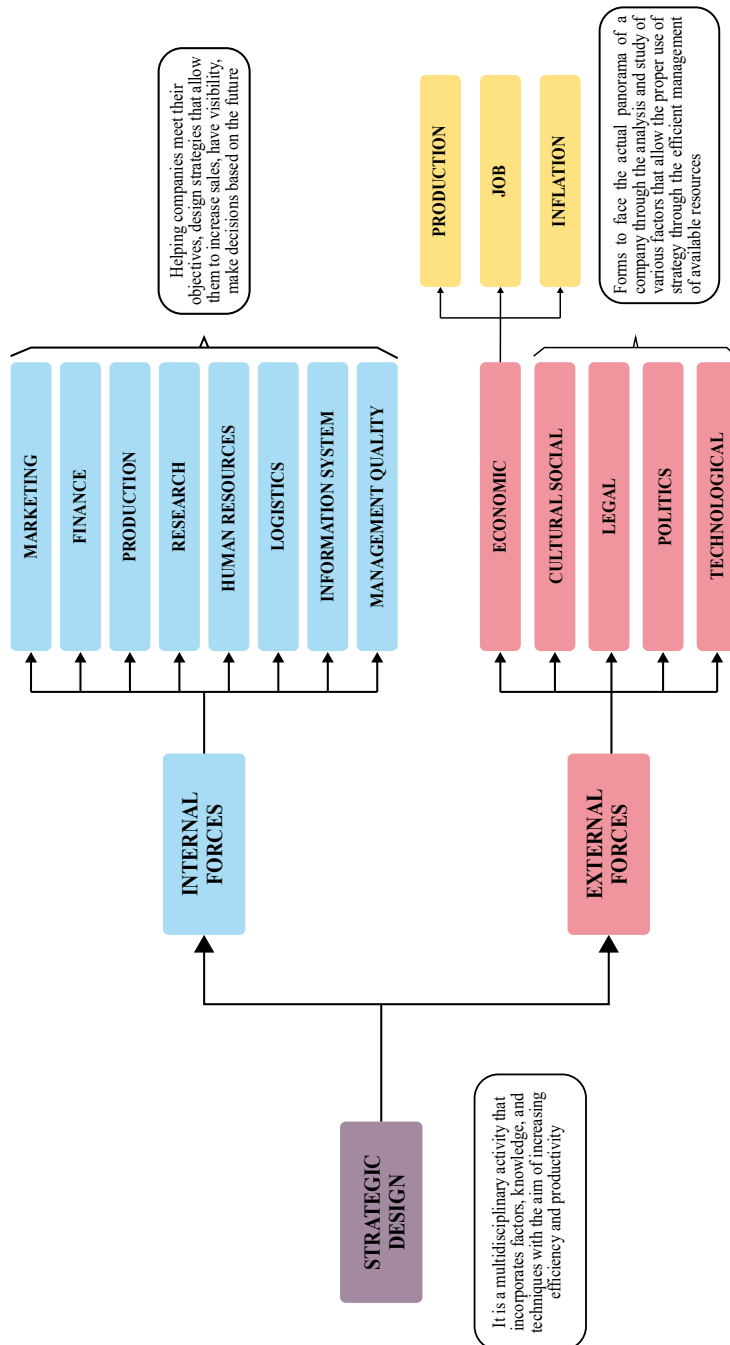
Prepared by: The authors

Strategic Design: conceptual diagram, broken down into conceptual aspects, subdivisions of the strategic design and keywords.

STRATEGIC DESIGN



Strategic design: conceptual diagram, broken down into conceptual aspects, type of forces, as well as keywords and conceptualization.



Prepared by: The authors

Solved Questionnaire

- 1. Since strategic design is a multidisciplinary activity, what is its objective and what develops said design?**

The objective of strategic design is to increase efficiency and productivity, improve working conditions and develop solutions directly linked to the company's customers.

- 2. Identify the internal forces of strategic design and mention which one is the most important to you and why?**

Marketing, finance and accounting, production, human talent, research, logistics, information system and quality management.

Personal opinion of the internal force.

- 3. What does production and development refer to and what is its purpose?**

It refers to a set of elements such as: materials, human resources, machinery, procedures, information, supplies that must be organized and related to each other in order to obtain a product or service.

- 4. For which purpose is strategic design used in companies?**

The determined purpose of achieving the objectives of the company through a series of detailed steps that help the design of strategies that allow the development of the company in addition to facing situations that occur without prior notice, giving way to a rapid adaptation and better future visibility.

- 5. Why is it important to know the information systems for a company?**

The information systems disclose data that help the organization to know consumption trends and interests that make it easier for the organization to have a clear idea of how to satisfy the interest groups.

- 6. Within the internal forces, what is the relationship between quality management and strategic design?**

Quality management are surveillance and control functions based on compliance with quality standards. Its relationship with strategic design is the satisfaction of interest groups through compliance with standards that allow offering quality products or services.

7. Why is it important to know economic forces?

Within the economic forces there are three factors which are: production, employment and inflation of which prior knowledge must be had for an efficient management of the company's resources, in addition to considering them as indicators to establish the success or failure of the economy.

8. Why is customer power important within a company?

The power of the customer is important because it generates profitability in the company and for this we must captivate customers and above all cover and satisfy their needs.

9. How does the development of substitute products affect the company?

One of the main threats is the price, since the new substitute product can provide the same functions at a lower cost, which would generate significant losses.

10. What is recommended to do so that substitute products are not a threat?

Technology is currently the peak of inventions, but people are also attentive to caring for the environment, so substitute products could be faced with green label products.

3.4 VARIABLE PRIORITIZATION MATRIX

Author definitions

1. It is used to establish priorities in tasks, activities or topics, based on known weighting criteria. It uses a combination of two of the other tools, tree diagram and matrix diagram, narrowing down the possible options to those that are most effective and desirable. This tool

replaced the tool known as “Data Matrix analysis” that was part of the initial set of seven management and planning tools. (Cesar, Cruz, & Gonzalez, 2006)

2. Provides the opportunity to create evaluation criteria. In this case, the aim is to rank the productive chains in light of a series of variables, based on qualitative scales, appreciated by panels of experts or work groups. Thus, qualitative elements are combined with subjective qualifications, which can be weighted and qualified to obtain votes and consensus. This serves to quantify the judgments, values and points of view of a human group, to weigh the opinions and feed the decision-making process (Popper, 2008)
3. It is a method for establishing priorities based on the magnitude of the problem, the severity of the problem, the effectiveness of the solution, and the feasibility of the program or intervention. (Sanabria, 1999)
4. It's a technique for prioritizing tasks that could very well be the answer to your overloaded to-do list problems. (Moon, 2019)
5. Project management and control tool that is used to determine key problems and evaluate the appropriate alternatives for a given objective. In other words, it is a system that facilitates decision-making and guarantees that actions are undertaken based on criteria of objective utility. (Martin, 2018)

In summary, prioritization matrices are strategic development tools, as they help to make informed decisions, establish clear priorities and effectively allocate available resources. In addition, they help establish a clear strategic focus and facilitate internal and external communication on key focus areas to achieve business objectives.

In conclusion, it can be stated:

- a) The prioritization matrix or multi-criteria matrix is a verbal instrument that is used to evaluate various possibilities, scoring them in relation to criteria of interest for a problem, in such a way that voting is objectified.

- b) The variable prioritization matrix is a tool that helps researchers to prioritize tasks in relation to the priority they present for solving company problems, which facilitates decision-making within the organization by optimizing time.
- c) The prioritization matrix is a business management tool which establishes the urgency of solving the variables depending on the magnitude and severity of the problem, as well as its solution and reliability, helping to resolve overloaded pending issues that organizations have.

3.5 EVALUATION MATRIX OF INTERNAL AND EXTERNAL FACTORS

Definitions:

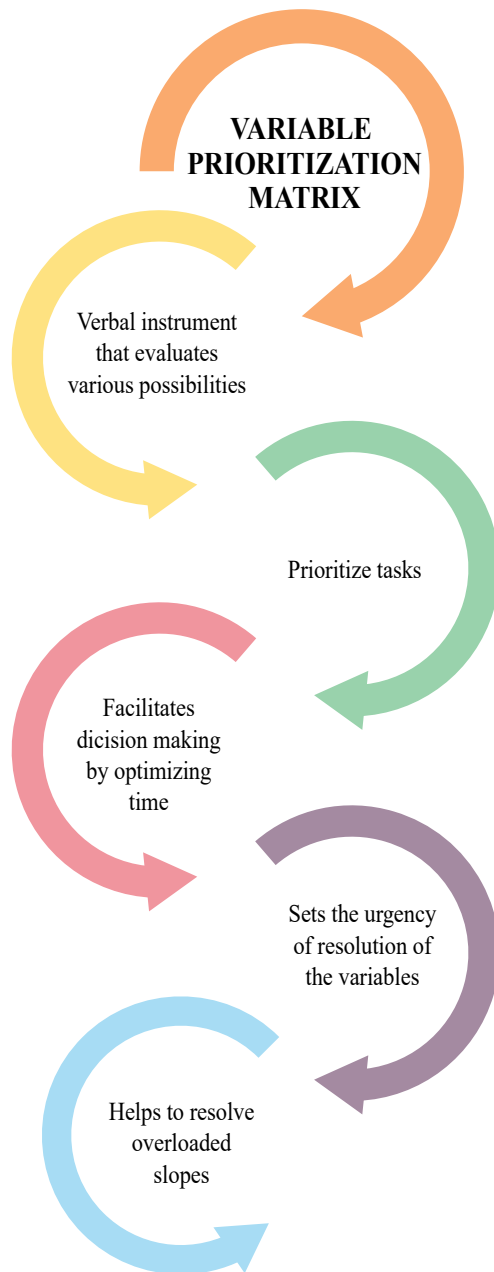
1. **According to David F., (1997)** a simple quantitative analysis of the external factors is established, that is, of the opportunities and threats through the following procedure: a) Make a list of the external opportunities and threats that the company has; b) assign a relative weight in a range from 0 (irrelevant) to 1.0 (very important); the weight shows the relative importance considered of each factor, avoiding that the opportunities have more weight than the threats, being necessary to establish that the sum of all the opportunities and the threats must be 1.0; c) Weight with a rating from 1 to 4 each of the factors considered decisive for success in order to assess whether the company's current strategies are really effective
2. **According to Gehisy, (2016)** the internal factor evaluation matrix is used to formulate strategies, since it summarizes and evaluates the main strengths and weaknesses in functional areas of an organization, offering a basis for identifying and evaluating the relationships between them. The external factors evaluation matrix (MEFE) summarizes and evaluates the political, governmental, and legal information (P); economic and financial (E), social, cultural, and demographic (S); technological (T); and, ecological and environmental (E) and calculates the results through the opportunities and threats identified in the environment.

3. **David FR, (2013)** in his book “Concepts of Strategic Administration,” he expresses that the EFE matrix is one that allows summarizing and evaluating information about the opportunities and threats of the organization; while the EFI matrix is a synthesis of the most important strengths and weaknesses found in the organization, and constitutes a basis for identifying and evaluating the relationships between these areas.
4. **To VEINTIMILLA & VEINTIMILLA, (2014)** it allows synthesizing and evaluating the information obtained from the opportunities and threats identified as critical factors that determine the success of the company in the sector in which it operates, the above taking into account a weight or importance according to the relevance of each factor, and granting an estimated rating with one (1) being the worst scenario and four (4) being the best scenario. The Internal Factors Evaluation Matrix determines and evaluates the strengths and weaknesses and summarizes the most important ones, thus offering a clearer panorama to analyze.
5. **According to Romero & Suarez, (2017)**, the MEFI matrix is carried out through an internal audit to identify both the strengths and weaknesses that exist in all areas of the business and the external factors evaluation matrix (MEFE) summarizes and evaluates the political, governmental, and legal information (P); economic and financial (E), social, cultural, and demographic (S); technological (T); and, ecological and environmental (E) and calculates the results through the opportunities and threats identified in the environment.

In summary, the internal and external factors assessment matrix is a valuable tool for comprehensively assessing the business environment and making informed strategic decisions. It helps to identify key areas, prioritize resources, adapt to change and drive sustainable success through effective communication within and outside the organization.

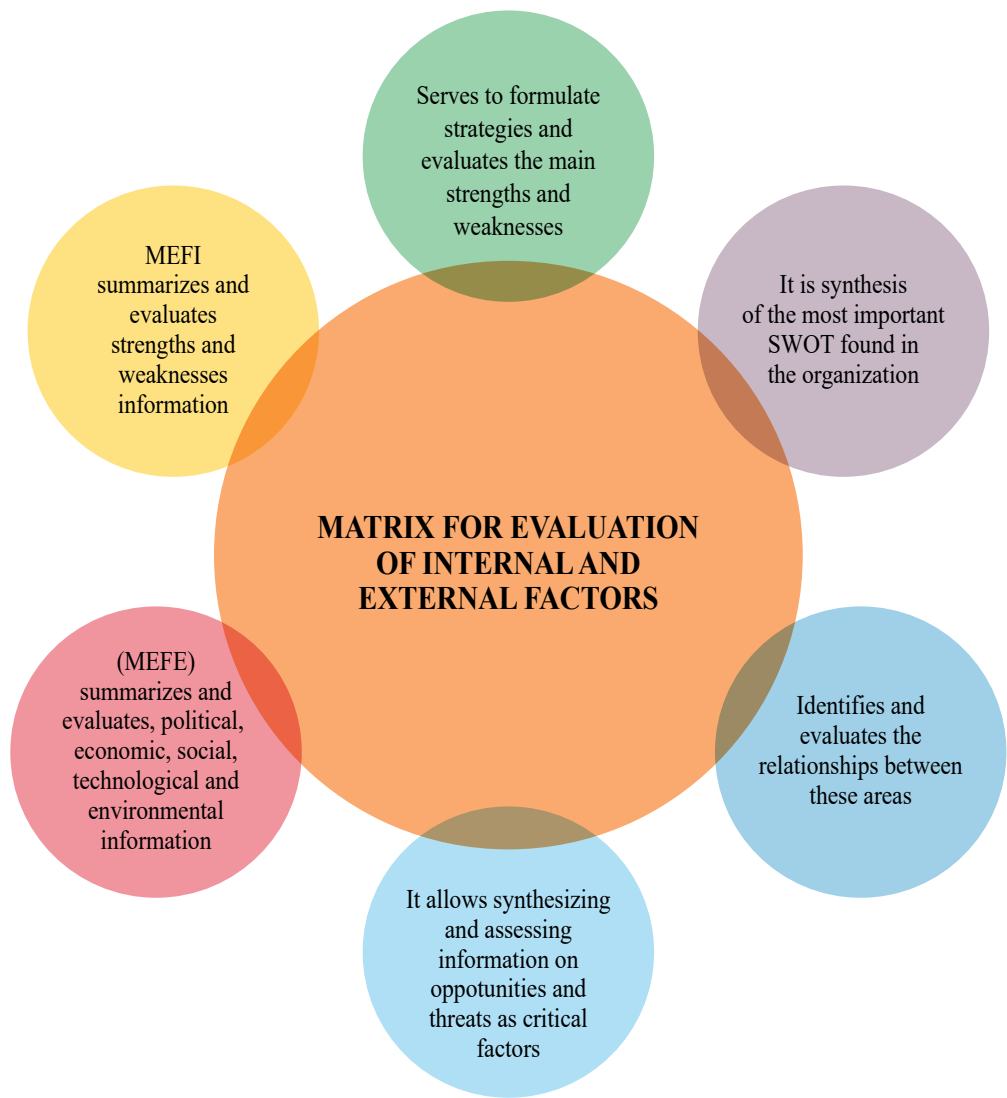
Graphic organizers

Variable prioritization matrices: pie chart, broken down into conceptual aspects



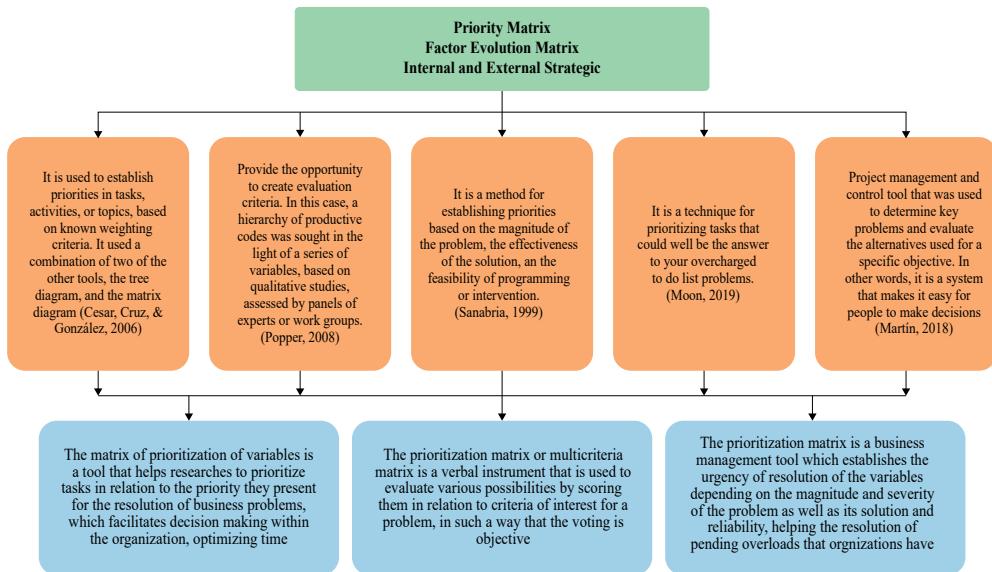
Prepared by: The authors

Evaluation matrix of internal and external factors: circular diagram, broken down into conceptual aspects.



Prepared by: The authors

Priority matrix of internal and external strategic factors evaluation matrix: circular diagram, broken down into conceptual aspects



Prepared by: The authors

Internal factor evaluation matrix serves to formulate strategies, as it summarizes and evaluates the main strengths and weaknesses: circular diagram, broken down into conceptual aspects.



Prepared by: The authors

SOLVED QUESTIONNAIRE

- 1. According to Cruz & González, what combination of tools does the prioritization matrix use?**

Tree diagram and matrix diagram

- 2. According to Popper, the prioritization matrix work with qualitative scales appreciated by what?**

- Expert panels
- Work groups

- 3. What type of instrument is the prioritization matrix?**

Verbal instrument

- 4. What does the management of the prioritization matrix depend on?**

Depends on its magnitude and the severity of the problem

- 5. What advantage stands out from using the prioritization matrix?**

Optimizing time for decision making

- 6. Is there a procedure to establish a quantitative analysis of external factors?**

Real

Fake

- 7. The internal factor evaluation matrix evaluate opportunities and threats while the external factor evaluation matrix evaluates the main strengths and weaknesses**

Real

Fake

- 8. The EFI and EFE evaluation matrices are tools that can be used for what?**

It will serve later for DOF strategies

9. How do the EFE and EFI evaluation matrices help in business management?

They assist in the assessment and evaluation of information obtained by the company.

10. What type of information does the external factors evaluation matrix summarize and evaluate?

Political, economic, social, technological and environmental.

3.6 SWOT MATRIX AND ITS IMPACT

According to Lajara, (2018), the SWOT matrix is a simple but widely used tool for strategic decision making. This is a summary of all the internal and external strategic analysis, which jointly presents the main conclusions obtained from it. The DaFO expression is an acronym for the words Weaknesses-Threats-Strengths-Opportunities.

To Quintanal Diaz Jose, (2021), the DAFO matrix must be used objectively considering the elements that make it up and, whenever possible, incorporating data that allows quantifying and measuring the evolution of the elements mentioned in each area. By using the DaFO matrix an organization can choose one of the 4 strategic plans as follows:

- Use opportunities through existing strengths.
- Use strengths to eliminate or reduce the impact of threats.
- Take into account the weaknesses to take advantage of the opportunities.

To Orchard, (2020) the SWOT matrix is a key tool for making a detailed assessment of the current situation of an organization or person based on their strengths and weaknesses and the opportunities and threats offered by their environment.

When to use:

- Before creating a company
- Once a year to maintain or redefine strategy

- Before a new project.
- Prior to any internal or external change that we believe materially affects our competitive position.

According to Goig Martínez, RM Quintanal Díaz, J. and Trillo Miravalles, MP (2021), the SWOT analysis matrix is a well-known strategic tool for analyzing the company's situation. The main objective of applying the SWOT matrix in an organization is to offer a clear diagnosis in order to make the appropriate strategic decisions and to improve in the future. Its name derives from the acronym formed by the initials of the terms: weaknesses, threats, strengths and opportunities. The SWOT analysis matrix allows us to identify both the opportunities and the threats that our market presents, that is, the strengths and weaknesses that our company shows.

Thompson and Strikeland (1998) establish that the SWOT analysis estimates the effect that a strategy has to achieve a balance or adjustment between the internal capacity of the organization and its external situation, that is, the opportunities and threats. These acronyms come from the acronym in English SWOT (strengths, weaknesses, opportunities, threats); in Spanish, they allude to strengths, weaknesses, opportunities and threats. The SWOT analysis consists of carrying out an evaluation of the strong and weak factors that, as a whole, diagnose the internal situation of an organization, as well as its external evaluation, that is, the opportunities and threats. It is also a tool that can be considered simple and that allows obtaining an overview of the strategic situation of a given organization.

In summary, the SWOT matrix is an important strategic tool because it allows a comprehensive analysis of the internal and external factors affecting the organization. It helps to identify competitive advantages, manage risks and drive business strategy. It also helps make informed decisions and promotes effective communication within and outside the organization. As a result, companies can capitalize on their strengths, overcome weaknesses and adapt to changing circumstances to achieve sustainable success.

In conclusion with the above, it can be noted:

- The main objective of applying the DaFO matrix in an organization is to offer a diagnosis in order to make the appropriate strategic decisions and to improve in the future.
- The SWOT analysis is a methodology for studying the situation of a company or a project, analyzing its internal characteristics (Strengths and Weaknesses) and its external situation (threats and Opportunities). The objective of this analysis is that the company, based on the information it obtains about its situation, can make the decisions or organizational changes that best adapt to the demands of the market and the economic environment.
- SWOT analysis is a strategic management technique used to help individuals or companies identify Strengths, Weaknesses, Opportunities and threats related to business competition and project planning.
- The SWOT matrix is a tool that allows us to analyze the internal and external situation of the company through which strategies can be established based on the needs presented by the matrix.
- The SWOT matrix is a practical tool that helps us determine the current situation in which an organization finds itself. For this, both external variables (Opportunities and threats) and internal variables (Strengths and weaknesses) are analyzed.
- The SWOT Study Matrix is a successful strategic tool for studying the company's case. The SWOT Study Matrix makes it possible to detect both the opportunities and the threats that our market shows, as well as the strengths and weaknesses that our organization shows.

***Example in Claro company.
Totals matrix and its impact***

Strengths	WEAKNESSES	THREATS	Opportunities	Total
Strong financial position (3)	Low quality of after-sales service (3)	High investment costs to increase coverage. (3)	Increase in new products (3)	12
high market share (3)	Lack of customer service culture (3)	State regulations are variable and unstable, which generates legal uncertainty and puts the company at risk. (3)	Training and adaptation of human personnel to technology and constant changes by the operator (3)	12
Experience and trajectory in the market (3)	Network drop and noise issues in certain places (3)	Economic instability (3)	Good relations with suppliers (2)	eleven
Adequate infrastructure (2)	Equipment depreciation (3)	High decision-making power of customers marked by services and promotions. (two)	Opening of new clients (2)	9
Market accepted pricing strategies (3)	Low lines of credit from the operator to the company (3)	Increased tariffs on cell phone imports. (two)	Company growth in other regions (2)	10
Assertive communication with clients (3)	Lack of stock of high turnover equipment (3)	Clients detractors of the brand (3)	Acceleration of the technological process. (3)	12
Proper management of web tools (1)	Low inventory level in several lines (3)		Increased demand (3)	7
Quality of coverage superior to the competition. (3)	Unsatisfactory distribution channels (3).		Barriers to entry in the operational market (2)	8
Efficient promotion strategies (3)	Poor technical service (1)			4
	Dissatisfaction in equipment supply (3)			3
TOTAL (24)	TOTAL(28)	TOTAL (16)	TOTAL (20)	TOTAL 100% 88

Where the percentage of the Optimization Factor is equal to the sum of the total of the variables Strengths and Opportunities, while the Risk Factor is equal

to the sum of the total of the variables Weaknesses and Threats

F + O = Optimization factor

D + a = Risk factor

Gives		F.O.		Factor
44	fifty%	44	fifty%	Risk

The perfect balance must exceed by a certain margin the FO per Day, in search of the best condition to operate, so the company is a risk factor in terms of the analysis of its internal and external variables.

STRENGTHS	WEAKNESSES	THREATS	OPPORTUNITIES	TOTAL
Track record in the market (3)	High tariffs(3)	New competitors (2)	User preference (3)	11
More customers(3)	High response time (2)	Unfair competition (3)	Broader equipment portfolio than competitors (2)	10
Market recognition (3)	Merger with Telmex (2)	Aggressive competition (3)	Equipment financing system (3)	11
National and international brand positioning (3)	Reissuance of antenna installation permits. (2)	Persecution and stigmatization of the brand (3)	Expanded nationwide distribution network.(2)	10
	User satisfaction indexes.(1)	Brand discrediting in the media.(3)	New technology products.(3)	7
Total (12)	Total (10)	Total (16)	Total (13)	Total (41)

According to (Buritica, 2017) Where the percentage of Optimization Factor is equal to the sum of the total of the variables Strengths and Opportunities, while the Risk Factor is equal to the sum of the total of the variables Weaknesses and Threats.

Da		FO		Factor
44	50%	44	50%	Risk

The ideal balance sheet should exceed by a certain margin the FO al Da, in search of the best condition to operate, so the company is in a risk factor in terms of the analysis of its internal and external variables.

3.7 SWOT MATRIX FOR THE FORMULATION OF STRATEGIES

Peñafiel Nivelá, Acurio Armas, Manosalvas Gómez, & Burbano Castro, (2020) state that for the strategy formulation process it is important to analyze a set of matrices which are concatenated to establish strategies that define the specific course of action that the subject will have to apply in his management as an administrator. Within the main matrices, the SWOT matrix was executed. The SWOT Matrix is the comparison of Strengths, Weaknesses, Opportunities and Threats. Its central purpose is to identify strategies to take advantage of external opportunities, counteract threats, accumulate and protect the company's strengths and eradicate weaknesses. More generally, the purpose of a SWOT analysis is to create, reinforce, or refine a company-specific business model that enhances it.

Goig Martínez, (2021) tells us that it is used to understand the current situation of a specific company, organization, product, service or agent, and also as an aid to formulate a social intervention. And it is capable of adapting, without diminishing its effectiveness, to any circumstance that the study using it poses. It is basically an analytical tool, which sets strategic thinking in motion by virtue of which it is possible to carry out a correct analysis of the position occupied by the organization or the resource, in relation to its environment.

The SWOT acronym is made up of four elements:

- «Weaknesses»,
- “Threats”,
- “Strengths”
- “Opportunities”

As indicated, it is a strategic planning framework used generically in the evaluation of all types of organizations, projects or activities. Therefore, it is an important tool for situation analysis that helps managers from various sectors to identify organizational and environmental factors, focusing on two dimensions: internal and external.

Muñoz War, (2018) mentions that the “SWOT” matrix (Strengths, Weaknesses, Opportunities & Threats), is a study and diagnosis methodology that analyzes the strategic situation of an organization in its external and internal

condition. The internal situation is made up of strengths and weaknesses as controllable factors, while the external or future situation is made up of opportunities and threats that are uncontrollable or little controllable factors to maintain the shared benefits of the agreement.

During the planning process and from the application of the cross-matrix it should be possible to answer each of the following questions:

- How can each strength be strategically leveraged?
- What is the behavior of the strengths in the previous three years and for the next three years?
- How can you take advantage of every opportunity?
- What is your behavior for each opportunity in the previous three years and for the next three years?
- How can each weakness be curbed or avoided?
- What was its behavior in the previous three years and what is its future projection in the next three years?
- How to prevent each threat?
- What happens if this threat presents itself?
- What background exists?
- How can we lessen the effect of threats using strengths?

To Gutierrez, (1999) the formulation of the strategy characterizes the product line, the services offered, the market segments and the distribution channels, among others. For the formulation of the strategy it is necessary to elaborate a diagnosis, both of the internal environment of the organization and of the external environment. To do this, its strengths and weaknesses must be assessed and the opportunities and threats seen in the external environment, all with the corporate mission and vision as a reference.

The formulation of a strategy has a purpose: the final success. When considering it, the following factors should be taken into account:

- **Clear and Decisive Goals:** Is all effort directed toward overarching goals

that are clearly understood, decisive, and supportive?

- Preserve initiative: Does the strategy preserve freedom and encourage commitment?
- Concentration: Do you precisely define what makes the company more powerful?
- Flexibility: Do you base the resource reserves and decisions necessary for flexibility and maneuverability?
- Coordinated and committed leadership: Do you encourage responsible leadership for each of your main goals?
- Surprise: Could it be applicable at any time?
- Security: Does it secure the resource base and other critical operational aspects?

According to Ponce Talancon, (2006) the SWOT Matrix, constitutes the basis or the starting point for the formulation of strategies. From the SWOT Matrix new matrices can be made, in this way from the SWOT Matrix (Strengths, Weaknesses, Opportunities and Threats), can be developed the analytical framework and strategies through the following stages:

Stage 1: Input Stage

1. Internal Factors Evaluation Matrix (MEFI).
2. Competitive Profile Matrix (MPC).
3. External Factors Evaluation Matrix (MEFE)

Stage 2: The Adaptation Stage

1. Threats, Opportunities, Weaknesses, Strengths (MaFE) matrix.
2. Matrix of the Strategic Position and the Evaluation of the action (MEPE).
3. Parent of the Boston Consulting Group (MBCG)
4. Internal -- External Matrix (MIE)
5. Grand Strategy Matrix (SGM)

Decision stage

1. Quantitative Matrix of Strategic Planning (MCPE)

In conclusion, it can be determined:

- The SWOT matrix allows us to determine the current situation of our company internally (Strengths, Weaknesses) and externally (threats, Opportunities). Based on this analysis, short- and long-term strategies can be proposed depending on the company's business and its objectives.
- The SWOT matrix is a methodology for the study and analysis of for-profit and non-profit organizations that is useful for planning and developing strategies.
- The SWOT matrix allows to create and reinforce the business model of the company through internal and external analysis, thus giving way to formulate strategies to adapt or improve each of the strengths, weaknesses, opportunities and threats that are presented in order to comply with the proposed objectives and goals.
- The SWOT matrix is the comparison of the strengths, weaknesses, opportunities and threats that can occur in the organization, where the main purpose of this matrix is to identify strategies to take advantage of opportunities, deal with threats, protect the strengths of the company and eliminate the weaknesses that arise in the company.
- The SWOT matrix is an important instrument that allows each of the companies to generate viable strategies for strengthening and improving it.
- The analysis of the SWOT matrix helps the company to know the current situation in which it finds itself analyzing the internal characteristics as well as the external situation, thus allowing the generation of strategies for each of the situations.
- The SWOT matrix is a tool that makes it possible to know and evaluate the real operating conditions of an organization, based on the analysis of these four main variables, in order to propose actions and strategies for its benefit.

In short, the SWOT matrix is an important tool in the strategy formulation process as it helps to identify competitive advantages, analyze the external environment, reduce internal gaps and develop an effective strategy. It also promotes differentiation and fosters clear communication both inside and outside the or-

ganization. As a result, companies can capitalize on their strengths, overcome weaknesses, take advantage of opportunities and respond effectively to the challenges of the business environment.

Example:

Strategic SWOT Matrix

CLEAR RIOBAMBA	OPPORTUNITIES <ol style="list-style-type: none"> 1. Increase of new products 2. Training and adaptation of human personnel to technology and constant changes by the operator 3. Good relationships with suppliers 4. Opening of new clients 5. Company growth in other regions 6. Acceleration of the technological process. 7. Increased demand 8. Barriers to entry in the operational market 	THREATS <ol style="list-style-type: none"> 1. High investment costs to increase coverage. 2. State regulations are variable and unstable, which generates legal uncertainty and puts the company at risk. 3. Economic instability 4. High decision-making power of customers marked by services and promotions. 5. Increased tariffs on cell phone imports. 6. Customers detractors of the brand.
STRENGTHS <ol style="list-style-type: none"> 1. High market share 2. Experience and trajectory in the market 3. Adequate infrastructure 4. Market accepted pricing strategies 5. Assertive communication with customers 6. Proper management of web tools 7. Coverage quality superior to the competition 	STRATEGIES FOR D6-D7-D10-O1-O7 Take advantage of the increase in new products to maintain a solid financial position. <ol style="list-style-type: none"> 1. F2 – 02Create good relationships with customers and suppliers to allow us to increase coverage and improve competitiveness 2. F3-O5Attract new customers through adequate infrastructure and customer service 	STRATEGIES Fa <ol style="list-style-type: none"> 1. F6-a4I Increase advertising with promotions for a greater reach to customers, achieving a return on investment in a short time. 2. F5-a6Through social networks, publicize all the service information, denying those defecting customers. 3. F3-a3 Create new plans with more time, in internet browsing 4. F4, a4Create a customer-friendly establishment through the application of sensory marketing in all establishments, 5. F8-a4 Establish a higher price, and offer from the product with the highest cost to the one with the lowest value to give the perception of being cheaper.

WEAKNESSES	DO STRATEGIES	STRATEGIES
<ol style="list-style-type: none">1. Low quality of after-sales service2. Lack of customer service culture3. Network drop and noise issues in certain places4. Equipment depreciation5. Low lines of credit from the operator to the company6. Lack of stock of high turnover equipment7. Low inventory level in several lines8. Unsatisfactory distribution channels9. Poor technical service10. Dissatisfaction in equipment supply	<ol style="list-style-type: none">1. D1–O1 Train all company employees in relation to customer service.2. D2–O2 Improve network antennas to prevent network downtime and improve customer relations.3. D6–O7 increase the stock of high-rotation equipment in order to enter new markets.	<ol style="list-style-type: none">1. D3–a1 Implementation of network access points through network drones, in specific geographical points2. D6–D10–a4 Weekly reports of stock for sale3. D7–a5 Calculation of sales projections for the product portfolio

Strategies should be oriented both to reduce weaknesses, reinforce and maintain strengths in search of suitable opportunities for the company’s capabilities, as well as to provide a defense against external threats. The accepted improvements must be consistent with the conditions or means of the company’s operations, in order to grow its skills and resources. The resulting strategies must increase the competitiveness of the organization, reinforcing the search for a favorable and sustainable position relative to other competitors.

QUESTIONNAIRE

1. What is the SWOT matrix and what is it for?

The SWOT matrix is a simple but very widespread tool in strategic decision making. It is a summary of the entire strategic analysis, both internal and external, which presents the main conclusions drawn from it. SWOT is an acronym for the words Strengths-Weaknesses-Threats-Strengths-Opportunities.

2. What are the elements that make up the SWOT matrix?

The SWOT analysis focuses on the four elements that are part of its acronym (F: strengths, O: opportunities, D: weaknesses, A: threats),

but the graphic format you use varies depending on the depth and complexity of your initiative or effort.

3. When should the SWOT matrix be used?

In an initial phase of the idea and business model by an Entrepreneur, the SWOT will be used to analyze the initial possibilities in the launching of the project, determining the strategy to be used. Later, once the project has already been launched to the market and with guarantees of success, a SWOT analysis can be performed again to determine the feasibility of launching a new product and/or service to the market.

4. What is the role of strategies in the SWOT matrix?

Strategies in the SWOT matrix allow you to plan for growth. By analyzing the key areas in terms of opportunities and threats, you will get the information you need to set your team up for success.

5. What factors should be taken into account when formulating a strategy?

Among the issues involved in strategy formulation are: deciding which new businesses to enter, which businesses to exit, how to allocate resources, expanding operations or diversifying, entering international markets, merging or forming a partnership, and how to avoid a hostile takeover.

6. The SWOT Matrix is the comparison of Strengths, Weaknesses, Opportunities and Threats. Its central purpose is to identify strategies to take advantage of external opportunities, counteract threats, accumulate and protect the company's strengths and eradicate weaknesses.

Real

Fake

7. The definition handled by Goig Martínez (2021) is:

- a) A basically analytical tool, which initiates strategic thinking by virtue of which it is possible to carry out a correct analysis of the po-

sition occupied by the organization or the resource, in relation to its environment.

- b) It states that for the strategy formulation process it is important to analyze a set of matrices which are concatenated to establish strategies.
- c) For the formulation of the strategy it is necessary to elaborate a diagnosis, both of the internal environment of the organization and of the external environment.
- d) The formulation of a strategy has an intention: the final success.

8. The formulation of a strategy has a purpose: the final success. When considering it, the following factors should be taken into account:

- a) Clear and decisive objectives, keeping the initiative, concentration, flexibility, coordinated and committed leadership, surprise, security.
- b) For this, their strengths and weaknesses must be assessed and the opportunities and threats must be looked at in the external environment.
- c) The internal situation is made up of strengths and weaknesses as controllable factors, while the external or future situation is made up of opportunities and threats that are uncontrollable or little controllable factors.
- d) The new SWOT Matrices can be made in this way from the SWOT Matrix (Strengths, Weaknesses, Opportunities and Threats),

9. Select the stages that can be developed in the analytical framework and strategies

Input stage

Control stage

Adaptation stage

Decision stage

10. At the moment of the decision stage, what matrix is applied?

Parent of the Boston Consulting Group (MBCG)

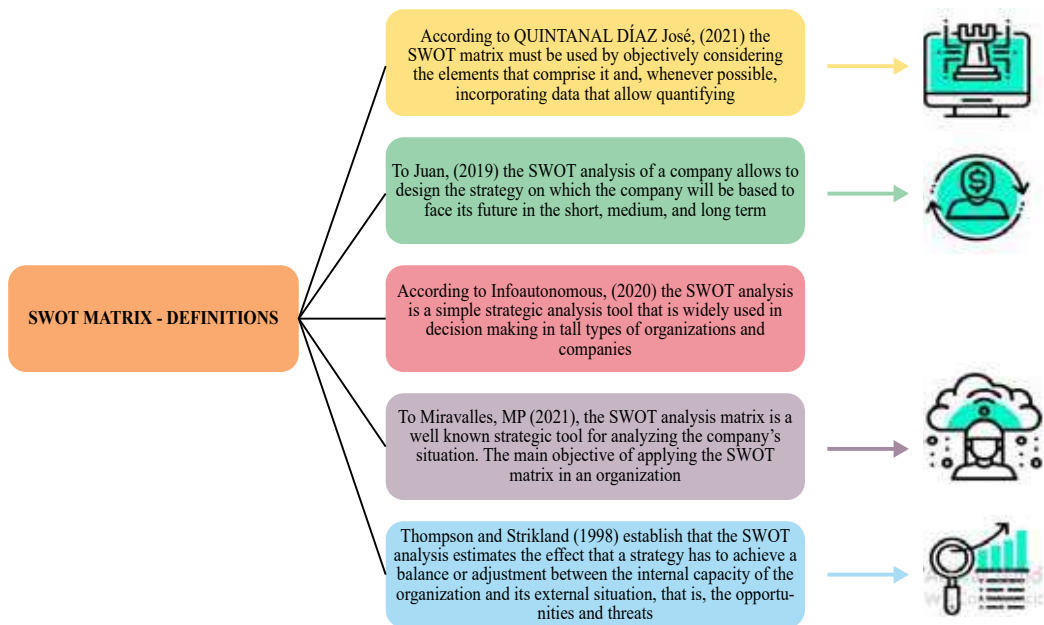
Internal -- External Matrix (MIE)

Grand Strategy Matrix (SGM)

Quantitative Matrix of Strategic Planning (MCPE.)

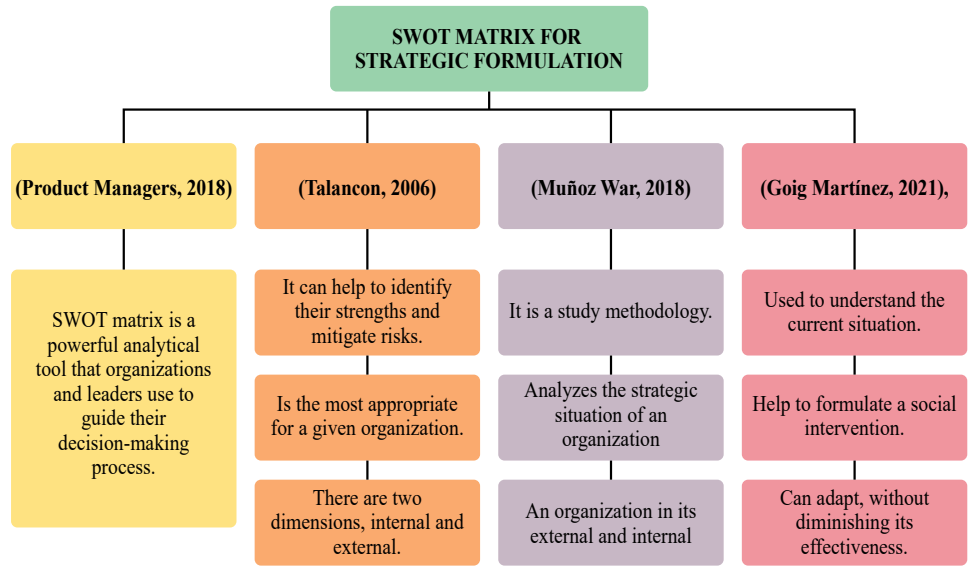
Quantitative Strategic Planning Matrix (QSPM).

GRAPHIC ORGANIZERS

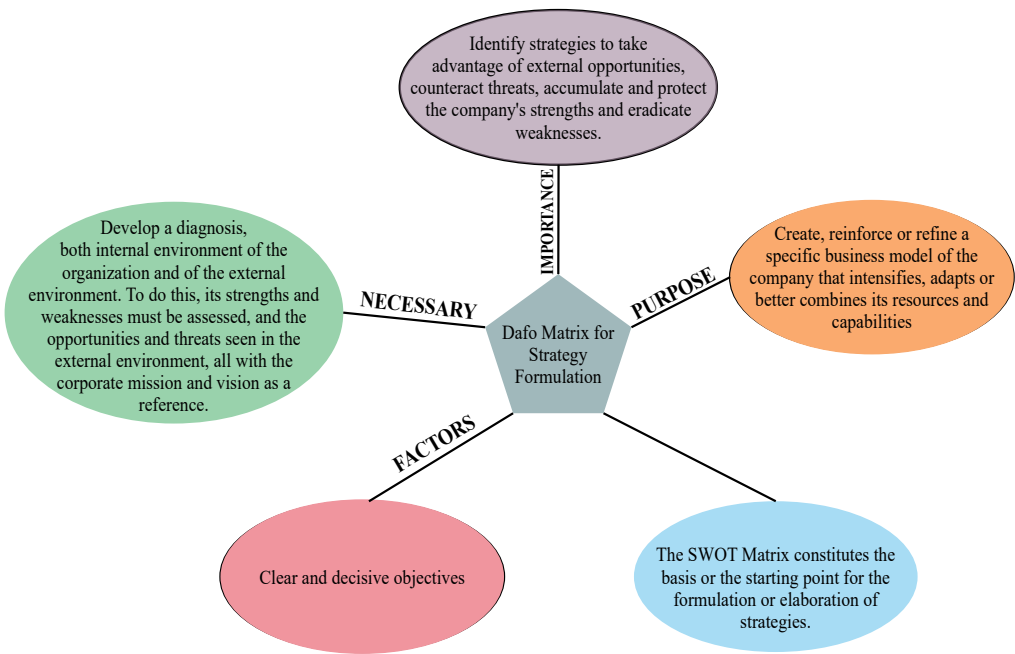


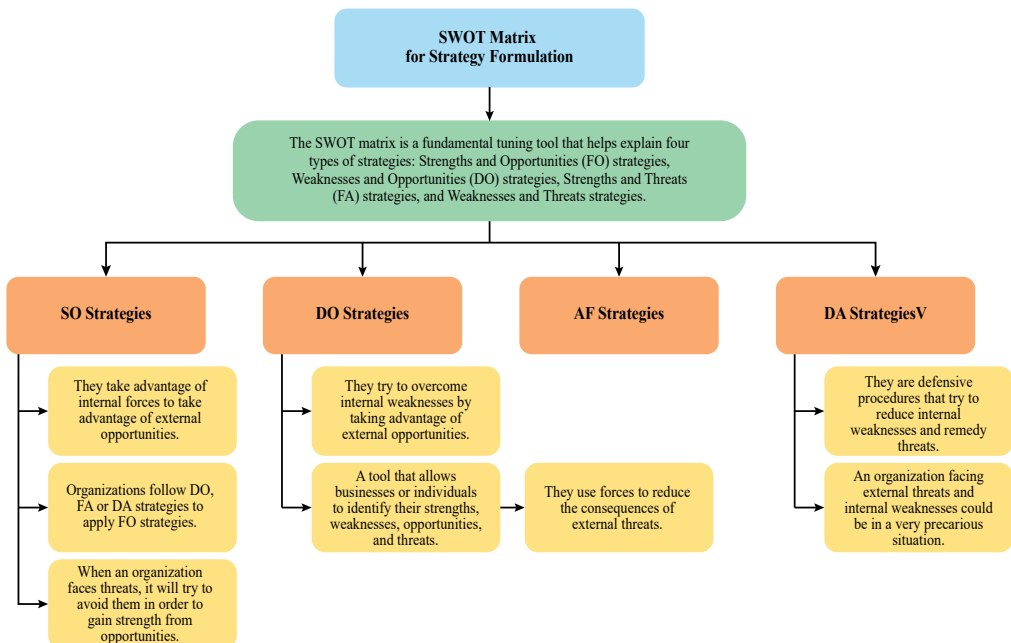
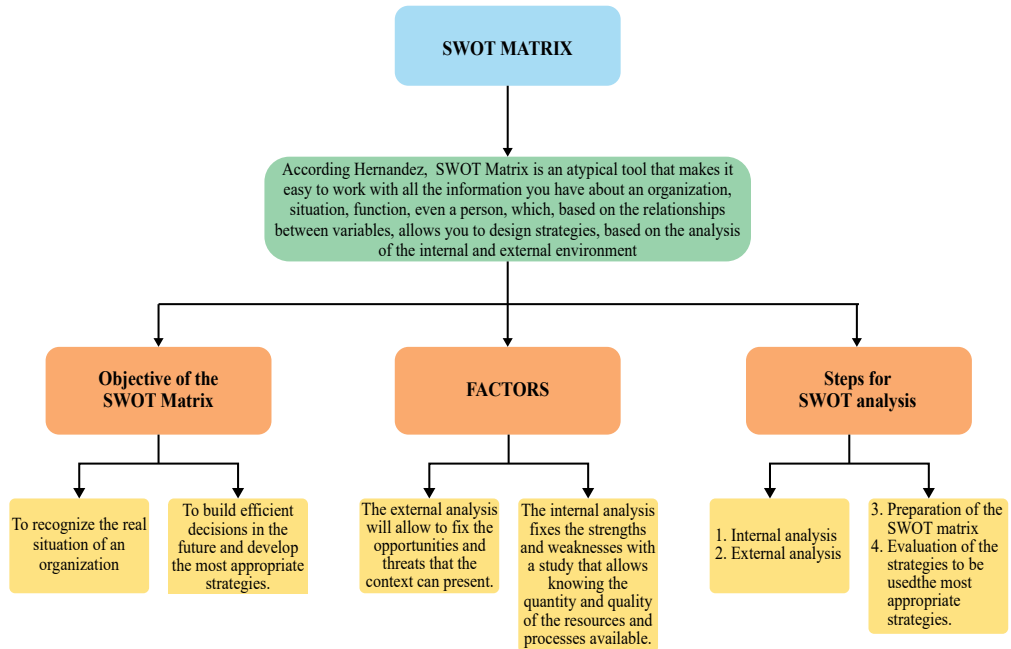
Prepared by: The authors:

SWOT matrix for the formulation of: conceptual diagram, broken down into conceptual aspects, analysis.



Prepared by: The authors:





CHAPTER IV

MEASUREMENT AND EVALUATION OF PERFORMANCE

4.1 WHAT IS PERFORMANCE AND ITS EVALUATION.

Pedraza, Amaya, & Conde, (2010), describe performance as those actions or behaviors observed in employees that are relevant to the objectives of the organization, and can be measured in terms of the skills of each individual and their level of contribution to the company. This performance may or may not be successful, depending on a set of characteristics that are often manifested through behavior.

Performance evaluation is an instrument used to check the degree of compliance with the objectives set at an individual level. This system allows systematic, objective and comprehensive measurement of professional conduct and performance or the achievement of results (what people are, do and achieve). **(Galpin T.J, 2013)**

According to Nirian, (2020), performance evaluation is a systematic and periodic process of quantitative and qualitative estimation of the degree of efficiency with which people carry out the activities and responsibilities of the positions they hold. Its purpose is to judge or estimate the value, excellence and qualities of a person and, above all, her contribution to the organization. Thus, it is possible to determine supervision and management problems, integration of people into the organization, adequacy of the person in charge, possible dissonances or lack of training. In order, consequently, to be able to establish the means and programs to eliminate or neutralize such problems, improving the quality of work and the quality of life in organizations.

Performance evaluation is a systematic appraisal of the value that a person shows, due to their personal characteristics and/or their benefits, to the organization of which they are a part, periodically expressed in accordance with a precise procedure conducted by one or more knowledgeable persons both of the person and the job. **(Gan, 2012)**

Performance evaluation is a possible answer to the previous problem. It is a tool that allows us to quantify and establish parameters for the management and work of people. In this way, it allows establishing improvement plans and strategies to know quantitatively if there were advances, improvements or progress. thus, we stop thinking or feeling that things have improved or worsened, to know and demonstrate how and how much. (Navarro, 2016)

Martinez Guillen, (2012), defines performance evaluation as a continuous and systematic procedure of analysis that allows to make judgments about the personnel of a company, in relation to their work, in a given period of time (past and future), whose objective is the integration of organizational objectives with individual ones.

In summary, performance and its evaluation are essential aspects of any organization because they drive continuous improvement, identify individual or team strengths and weaknesses, set realistic goals, recognize outstanding performance, and drive informed decisions. In addition, they foster a performance culture that values individual and collective efforts to achieve organizational goals. Their importance is the constant growth of individuals and companies.

4.2 WHY EVALUATE PERFORMANCE?

According to Alles, (2010), the analysis of the performance or management of a person is an instrument to direct and supervise personnel. Among its main objectives we can point out the personal and professional development of collaborators, the permanent improvement of the organization's results and the adequate use of human resources.

On the other hand, it builds a bridge between the person in charge and his collaborators of mutual understanding and adequate dialogue regarding what is expected of each one and the way in which expectations are met and how to improve results.

Employers and employees are skeptical about performance reviews. It is commonly believed that performance appraisals are or are made to decide whether or not to raise salaries, or who should be fired. This may be true at times, but the meaning of performance reviews is much richer and has other implications for the boss-employee relationship and the longer-term relationship between the company and the employees.

In short, performance evaluations are useful and necessary to:

- Make promotion and compensation decisions.
- Gather and review managers' and subordinates' evaluations of employee behavior in relation to work. Let us remember Edgar Schein¹ when he explains that a worker “needs to know how he is doing his job”, the degree of satisfaction that his employers have in relation to the task performed.
- Most people need and expect that feedback; From knowing how they do the task, they can know if they should modify their behavior.

A performance evaluation must always be carried out in relation to what is required by the position. It can only be said that a person performs well or poorly in relation to something, in this case “that something” is the position he occupies. Comparing the profile of a job with that of the person evaluated, a relationship between the two is established, the person-job fit.

In summary, evaluating performance is important because it provides valuable feedback for continuous improvement, identifies training needs, sets realistic goals, and allows recognition and reward for outstanding achievements. In addition, it aids in informed decision making and helps create a performance-based culture within the organization.

4.3 ASPECTS TO EVALUATE IN JOB PERFORMANCE

For some companies, the important thing is that the worker performs, that he conquers the goals established a priority, that he produces effectively and efficiently, in a numerical “transactional” context; while other companies care about the human being in a “transformational” environment, which seeks to improve their personal and even family quality of life. The most salomonic and healthy thing is to cover both aspects, that is, the performance evaluation must include two dimensions of analysis: the first qualitative, referring to the fulfillment of competencies defined in the position, and the second quantitative, referring to the performance or results obtained by the worker in the performance of their duties (Louffat, 2016).

Employee performance evaluation is vital for any company that wants to check the level of internal productivity. It is especially useful to analyze whether or not the objectives of the workers are being met and to be able to make decisions that help benefit the company so that it continues to meet its goals or objectives.(Viana López C.J, 2013)

The following aspects are considered for job performance:

1. Organization
2. Responsibility
3. Conduct
4. Resource management
5. Interaction with co-workers
6. Commitment
7. Contribution
8. Cooperation
9. Conflict management
10. Change Management

Gan, (2012) mentions that the performance evaluation is:

A systematic assessment of the value that a person shows due to their personal characteristics and/or their benefits to the organization of which they are a part of. Occasionally expressed in accordance with a precise procedure conducted by one or more people who are knowledgeable about both the person and of the job.

4.4 RECOMMENDATIONS TO REMOVE EVALUATION BARRIERS

According to Fernandez Lopez (2009), centered on the need to assume the existence of these limitations, experience points to the following recommendations:

- Plan the evaluations. They start at the moment immediately after the last evaluation.
- Record events, incidents, milestones and achievements. The performance of each one of the collaborators must be recorded, noting the most outstanding aspects, with their corresponding date. It is about writing only the essentials, thus obtaining a large amount of information for the final report.

When facing the interview with those evaluated, you gain in assertiveness and conviction. Of course you can be wrong, but the team finds that the manager pays attention to all team members.

- **Provide frequent informal feedback.** It is an error to commit the entire feedback task to the evaluation report.

One of the most incriminating and embarrassing questions an appraisee can ask after an appraisal is “Why didn’t you warn me sooner?”

If frequent informal feedback is practiced, the manager will be freer to write his impressions in the report.

- **Ask awkward questions.** The evaluator should ask the following questions:
 - Who are my favorite collaborators, where do my sympathies go?
 - To what extent do these affinities mark the evaluations?
 - What areas for improvement does that person in question have? The same with those members who are most unfriendly or contrary
 - To what extent do my phobias affect the report?
 - What strengths do I see and admit in that team member?

Job analysis serves to describe the nature of the tasks entrusted to company personnel and to specify the individual characteristics required for a given individual to adapt to a job and carry out the functions entrusted to him by the organization. (Levy Leboyer, 2007)

According to the statement, all aspects of performance appraisal are essential to obtain a complete and objective understanding of employee performance.

Some key aspects include achievement of goals and objectives, technical competence, interpersonal skills, initiative and innovation, entrepreneurship, adaptability, and achievement of results.

4.5 THE JOB ANALYSIS MUST PROVIDE INFORMATION ON:

- Position identification.
- Its objective.
- Responsibilities of the holder or holders.
- His relationships with other people.
- Physical conditions of work.
- Salary and professional conditions.

Chiavenato, (2009) states that organizations are increasingly interested in the performance of their employees and that, until a few years ago, this performance could be evaluated through bureaucratic and routine schemes, given the stability and permanence in employment. However, times of change, transformation and instability have given rise to the need to add value to the organization, for the people who work in it and for the clients they serve, which has led to innovation in the methods of evaluation. The most used traditional methods of performance evaluation are:

- **Graphic Rating Scale:** It is a matrix where the evaluation factors are recorded in the rows and the performance evaluation ratings in the columns. The evaluation factors represent the relevant criteria or the basic parameters to evaluate the performance of the subjects to be evaluated, such as behaviors and attitudes. Thus, the directors who achieve better performance in their activities obtain higher ratings, regardless of whether they are independent, proprietary or related.

Graph 1. Graphic scoring scale

Source: <https://elibro.net/es/ereader/espoch/124949>

Nombre del sujeto evaluado: _____ Cargo: _____ Comité: _____ Instrucciones para el evaluador: A continuación encontrará factores a ser evaluados. Anote una x en la columna que considere es el más apropiada para definir el desempeño del sujeto a ser evaluado. No deje ninguna fila sin llenar.					
FACTORES	EXCELENTE	BUENO	REGULAR	TOLERABLE	DEFICIENTE
Realización: (Eficacia en el desempeño del cargo)	Siempre supera los parámetros	A veces supera los parámetros	Satisface los parámetros	A veces debajo de los parámetros	Siempre debajo de los parámetros
Calidad: (Eficacia en el desempeño del cargo)	Trabajo de calidad excepcional	Trabajo de calidad superior	Calidad satisfactoria	Calidad insatisfactoria	Trabajo de pésima calidad
Conocimiento del cargo: (Pericia y experiencia aplicada)	Conoce todo lo que debe ejecutarse en su cargo	Conoce más de lo suficiente	Conoce lo suficiente	Conoce parte de las funciones de su cargo	Conoce poco de las funciones de su cargo
Cooperación: (Relaciones interpersonales al funcionar en equipo)	Excelente espíritu de colaboración	Buen espíritu de colaboración	Colabora normalmente	Colabora poco	No colabora

- **Forced Choice:**The new format was called the forced choice method, also called forced, where, instead of indicating the greater or lesser amount of each characteristic that an officer possessed, the evaluator chose between several sets of four adjectives or phrases, which best characterized the evaluated subject.

The evaluator has the obligation to choose one or two of the sentences of each block, the one that best applies to the performance of the evaluated collaborator. You can also choose the phrase that is furthest away from him. Hence its forced choice name. The challenge is to adapt a similar table to evaluate the Board of Directors, taking into account the specificities of each company.

In summary, job analysis provides valuable information about the tasks, responsibilities and requirements associated with a specific job. This information is useful for designing and organizing work efficiently, selecting personnel appropriately, describing jobs clearly, evaluating job performance, and planning development and training programs.

Graph 2. Forced choice method

Source: <https://elibro.net/es/ereader/epoch/124949>

MÉTODO DE ELECCIÓN FORZADA

EVALUACIÓN DE DESEMPEÑO			
Nombre: _____			
Cargo: _____			
Departamento: _____			
<p>Enseguida encontraré bloques de frases- Escriba una “x” en la columna del lado con el signo “+” para indicar la frase que mejor define el desempeño del empleado, y con el signo “-”. Para la frase que menos define su desempeño. No deje ningún bloque sin llenar en ambas columnas.</p>			

Presenta Producción elevada	N	+	-
Comportamiento dinámico			
Dificultad con los números			
Es muy sociable			

Dificultad para tratar a las personas	N	+	-
Buenas iniciativas			
Hace reclamos			
Teme pedir ayuda			

Tiene espíritu de equipo	N	+	-
Es ordenado			
No soporta la presión			
Acepta críticas constructivas			

Potencial de desarrollo	N	+	-
Toma decisiones con criterio			
Es lento y demorado			
Conoce su trabajo			

Buena presentación personal	N	+	-
Comete muchos errores			
Ofrece buenas sugerencias			
Dificultad para tomar decisiones			

Nunca se muestra antipático	N	+	-
Producción razonable			
Buena Memoria			
Se expresa con dificultad			

4.6 EXCEPTIONAL INCIDENTS:

In this method, any extreme behavior that constitutes a determinant of excellent or poor performance of the valued subject is called an exceptional incident. In other words, they are extremely positive performances in cases of success, or negative in case of failure. The method is not concerned with normal performance, but rather with unusual performance, whether outstanding or poor.

Graph 3. Official incidents

Source: <https://elibro.net/es/ereader/epoch/124949>

<p>Nombre del sujeto evaluado: _____</p> <p>Cargo: _____</p> <p>Comité: _____</p> <p>Instrucciones para el evaluador: De los siguientes aspectos a evaluar, indique con una (x), cuales fueron los aspectos excepcionalmente positivos o excepcionalmente negativos que determinaron el desempeño del sujeto evaluado, durante el ejercicio que se califica.</p> <p>Sobre los aspectos seleccionados, cuestione mediante entrevista, las razones por las que considera esos aspectos como sobresalientes o deficientes. Haga un reporte por separado del resultado de su entrevista. Indique todo lo observado durante esa labor.</p>	
ASPECTOS EXCEPCIONALMENTE POSITIVOS	ASPECTOS EXCEPCIONALMENTE NEGATIVOS
<ul style="list-style-type: none">• Facilidad para relacionarse con las personas.• Facilidad para trabajar en equipo.• Facilidad para presentar ideas innovadoras.• Tenencia de características de líder.	<ul style="list-style-type: none">• Propensión a cometer muchos errores.• Imposibilidad de tener visión amplia de los asuntos.• Lentitud en la toma de decisiones.• Tenencia de espíritu conservador y limitado.

- **Checklists:** This method is used to check the presence or absence of a series of predefined performance characteristics. The checklists are very useful for assessing technical psychomotor skills or regularly complex procedures, skills related to communication with internal clients of the organization, quality or resource management.

Graph 4. Checklists

Source: <https://elibro.net/es/ereader/espoch/124949>

CRITERIOS	CUMPLIMIENTO			NO APLICABLE	CRITERIOS	CUMPLIMIENTO			NO APLICABLE
	SI	NO	PARCIAL			SI	NO	PARCIAL	
HABILIDADES PERSONALES DENTRO DEL CONSEJO					CUESTIONES ÉTICAS				
Decide con habilidad y certeza					Demuestra honestidad				
Manifiesta Liderazgo					Demuestra integridad				
Acepta recomendaciones y sugerencias					Demuestra no tener conflicto de interes				
Acepta responsabilidades					Mantiene independencia de criterios				
Emana actitud positiva					Posee prestigio				
Sabe evaluar y controlar riesgos					Cumple las normas del Consejo				
Tiene conocimiento del sector					Cumple el reglamento de los Comités a donde pertenece				
Aporta visión externa					Cumple los Estatutos de la sociedad				
Aporta conocimientos y experiencia					Evita las relaciones comerciales con los accionistas y con la sociedad				
Presta atención a los aspectos					Cumple con los requisitos establecidos en el Código de Trabajo				

In summary, the exceptional incident method is important because it identifies specific strengths and areas for improvement in job performance. In addition, it provides accurate feedback, drives exceptional performance, helps detect areas of risk and provides a basis for informed decision making. This methodology contributes to continuous improvement in employee performance and fosters an environment where excellence is valued.

4.7 PARTICIPATORY EVALUATION BY OBJECTIVES

This method can be adapted to evaluate the members of the Corporate system, as long as there is a strategic planning that sets the objectives and goals of the Board of Directors itself, its committees and the General Management. The general steps of this adapted method are:

1. Consensual formulation of the objectives.
2. Personal commitment to achieve the formulated objectives.
3. Joint setting of goals.
4. Provision of the necessary resources to achieve the objectives.
5. Performance
6. Evaluation
7. Intensive feedback

In summary, participatory appraisal by objectives is important because it promotes the active participation of employees in the goal-setting and evaluation process. This increases their commitment, orienting performance towards concrete results.

4.8 PEER EVALUATION

This method intends that each subject to evaluation is compared with their other peers, colleagues or people of the same category in certain characteristics, traits, skills or criteria.

Graph 5. Peer evaluation
Source: <https://elibro.net/es/ereader/epoch/124949>

1. CALIDAD DE TRABAJO					2. CREATIVIDAD				
Par con quien se compara	Sujeto de evaluación				Par con quien se compara	Sujeto de evaluación			
	Oliver	Lucía	Esmeralda	Ángel		Oliver	Lucía	Esmeralda	Ángel
Oliver					Oliver				
Lucía					Lucía				
Esmeralda					Esmeralda				
Ángel					Ángel				
Total de signos positivos					Total de signos positivos				

The control process applied to the evaluation of the worker's performance could generally consider the following stages: (Louffat, 2016).

1. Establishing performance standards is the definition of patterns of measurements or ideal results to be achieved by the evaluated worker, being necessary, therefore, to quantify them.
2. Assessing actual performance means measuring the way in which the evaluated worker has executed his functions and the results he has obtained in reality.
3. Comparing the actual performance with the expected ideal performance standards allows one to determine and appreciate if the performance of the evaluated worker was efficient or inefficient, if the encrypted performance expectations have been met or not, if the execution has been correct or incorrect, in what has been successful and what has failed, if that were the case.
4. Define the measures to be adopted, proposing the immediate and mediate future actions to follow, in the event that there were failures, in order to correct them. If, on the other hand, the performance had been optimal, the actions adopted should be aimed at achieving even higher performance in the future.
5. To measure job performance, the following aspects are evaluated, such as productivity, quality, efficiency, desires and aspirations, as well as both personal and professional projects of an employee for the fulfillment of the objectives that arise in an organization.
6. Reaching the goals should not be a surprise to anyone. Periodic measurement allows you to stay on top of progress towards goals. People can observe the different stages of progress that are identified along the way.

In summary, peer review is important because it provides an objective perspective, valuable feedback, fosters collaboration and mutual learning, promotes peer recognition and encourages continuous improvement. This methodology complements line manager evaluations by providing a more balanced and inclusive approach to assessing job performance.

In summary, all aspects of performance appraisal are essential to gain a complete and objective understanding of employee performance. Some key aspects include achievement of goals and objectives, technical competence, interpersonal skills, initiative and innovation, entrepreneurship, adaptability and achievement of results.

4.9 WHAT IS PERFORMANCE AND ITS EVALUATION

1. Performance is job performance and the action that the worker manifests when carrying out the main functions and tasks required by their position in the work context.
2. In my opinion, performance evaluation is a systematic process that quantitatively and qualitatively processes the degree of efficiency with which people carry out the activities and responsibilities of the positions they hold in their organization or company.
3. In the performance evaluation, the performance and behavior that the worker performs in the activities that he develops in the organization is compiled and the level of labor contribution that he presents within it is established.
4. Companies evaluate different aspects of their staff's work performance, both from a qualitative analysis that requires a person-centered approach, as well as from a quantitative analysis that is carried out through the indicators that reflect all the results obtained by the worker. Therefore, it is essential to analyze both methods to know the correct performance of each of the members of the company.
5. Performance evaluation is a fundamental part since the directors or executives of the company analyze the internal and external work carried out by human resources and according to the data collected and compiled, appropriate decisions are made to improve the efficiency and effectiveness of the company or organization.
6. Performance evaluation is a process in which directors and executives analyze the most relevant and irrelevant values of the company in order to efficiently and effectively determine what decisions can be made to obtain better results in internal and external factors.

7. It is a process that aims to estimate the value, excellence and qualities of a person and their contribution to the organization, this process is carried out periodically through a quantitative and qualitative estimate.
8. The evaluation of job performance allows assessing the level of knowledge, skills, performance and productivity of employees in their assigned positions, in order to determine strong and weak aspects to subsequently implement development and training strategies in a particular way.
9. Performance evaluation is a necessary tool within organizations and through the results obtained, it is possible to identify what are the needs that are noticed in the workers and from there determine the strategies to follow so that the company reaches its maximum performance. as well as it is also in charge of offering information for decision making.
10. Performance evaluation is a fundamental management tool in the company since the role they play consists on the actions and behaviors seen in the employees, which are crucial to meet the proposed goals, being of vital importance the motivation that allows the human resources staff to develop in the best way in the work and personal area.
11. Job performance refers to the quality of service or work performed by the employee within the organization. Here, everything from their professional skills to their interpersonal skills come into play, and that directly affects the results of the company.

4.10 ASPECTS TO EVALUATE IN JOB PERFORMANCE

1. The most important aspects that must be evaluated when determining job performance are: the quality with which the job is done, solution to problems, knowledge of the functions of the position, internal relationship and personal motivation.
2. To carry out a job performance evaluation, it is important to take into account the appreciation of the basic principles of the employees and several factors such as performance and productivity must be measured.

3. Reaching the goals should not be a surprise to anyone. Periodic measurement allows you to stay on top of progress towards goals. People can observe the different stages of progress that are identified along the way.
4. Job performance refers to the quality of service or work performed by the employee within the organization. Here, everything from their professional skills to their interpersonal skills come into play, and that directly affects the results of the company.

In summary, evaluating these key aspects of job performance is important to gain a complete picture of individual performance. By considering these aspects during periodic appraisals, accurate feedback and appropriate support can be provided to encourage the continued development of employees within the organization.

QUESTIONNAIRE

- 1. Read and complete the definition of performance according to Pedraza, Amaya, & Conde, (2010).**

The performance are those actions or..... in the employees, relevant to comply with the..... of the organization. performance can be..... Depending on a of characteristics manifested through the

- a) Behaviors, plans, successful or not, process, organization.
- b) Behaviors, goals, successful or not, set, conduct.
- c) Processes, goals, successful or unsuccessful, plan, conduct.
- d) plans. Processes, a goal, behavior, organization.

- 2. According to the author Nirian, (2020), what is the way in which effective work performance should be developed in the organization?**

- a) Responsibly fulfilling the positions that each one of them develops.
- b) Evaluate personal performance

- c) Responsibly and effectively fulfill their established position
- d) Properly carry out your work

3. What are the two dimensions that the performance evaluation must include?

- The first qualitative cut
- The second quantitative cut

4. According to the aspects to measure job performance. What is the difference between responsibility and behavior?

Responsibility: It is about fulfilling obligations and being careful when making decisions or doing something.

Behaviour: is related to the modality that a person has to behave in various areas of his life. This refers to the actions that a subject develops in the face of the stimuli that he receives and the links that he establishes with his environment.

5. Why should performance be evaluated?

To direct and supervise personnel, among its main objectives we can point out the personal and professional development of collaborators.

6. What are the stages in the performance evaluation process?

- a) Set performance standards.
- b) Information evaluation.
- c) Evaluate performance.
- d) Quality management

7. What is the benefit of the Real Performance Evaluation stage?

- a) It allows to determine and appreciate if the performance of the evaluated worker was efficient or inefficient
- b) Periodic measurement allows you to stay on top of progress towards goals.

c) The process of influencing other people to gain their understanding.

d) Create a suitable environment for companies to drive economic growth.

8. According to Levy Leboyer, (2007) job performance analysis should provide information on:

a) Salary and professional conditions

b) Problem solving

c) Motivation

d) Productivity

9. How does Martínez define job performance evaluation?

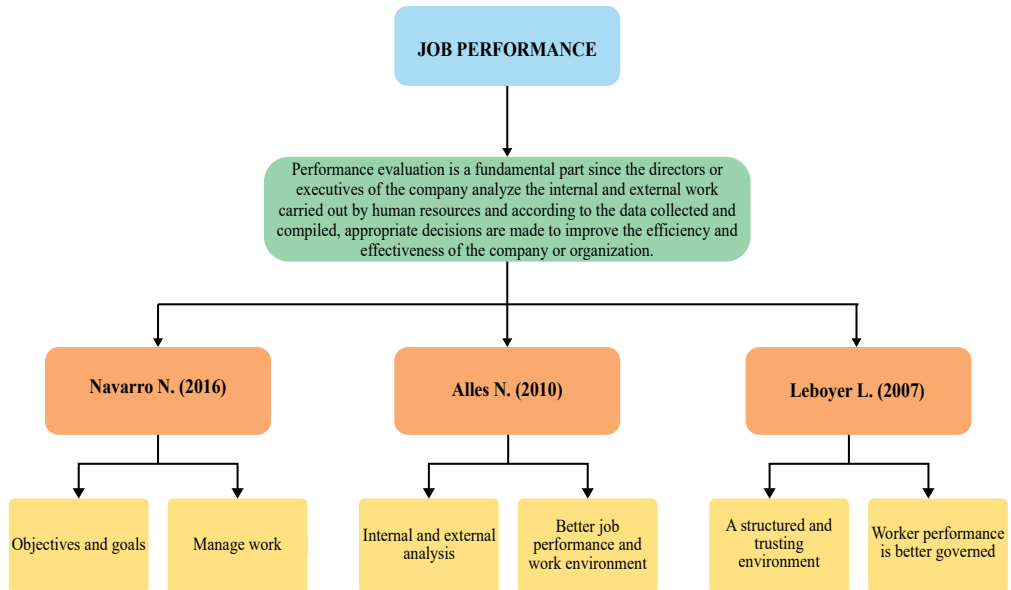
As a continuous and systematic procedure of analysis that allows making judgments about the personnel of a company.

10. What are the most used traditional performance evaluation methods that Chiavenato states?

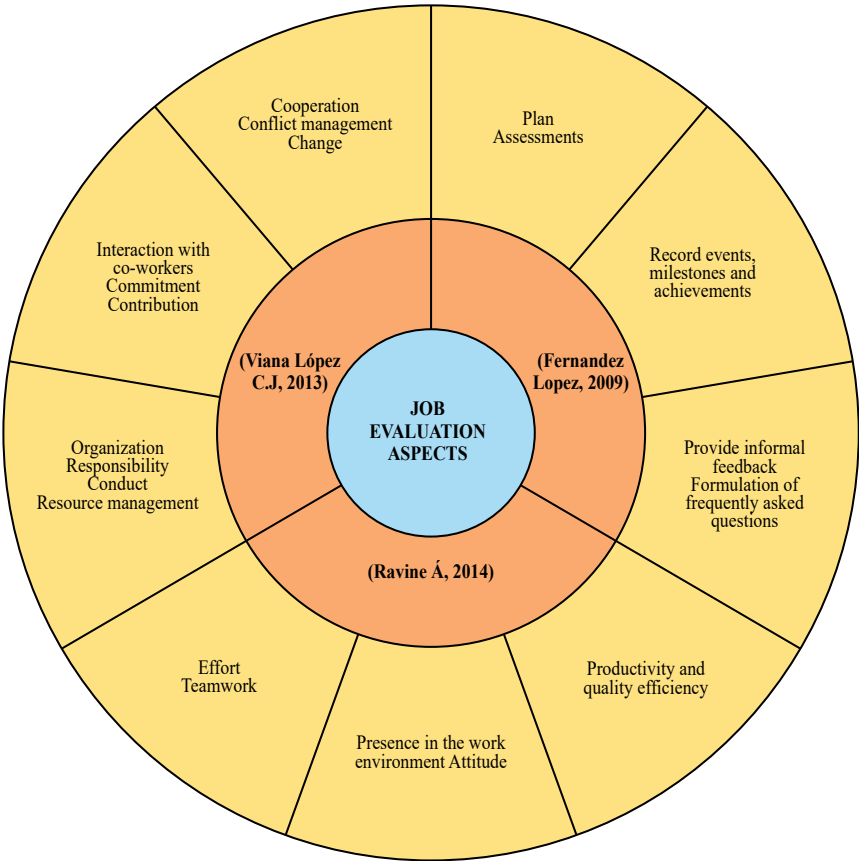
Graphic scoring scale, forced choice, exceptional indices, checklists, participatory object evaluation, and peer evaluation.

GRAPHIC ORGANIZERS

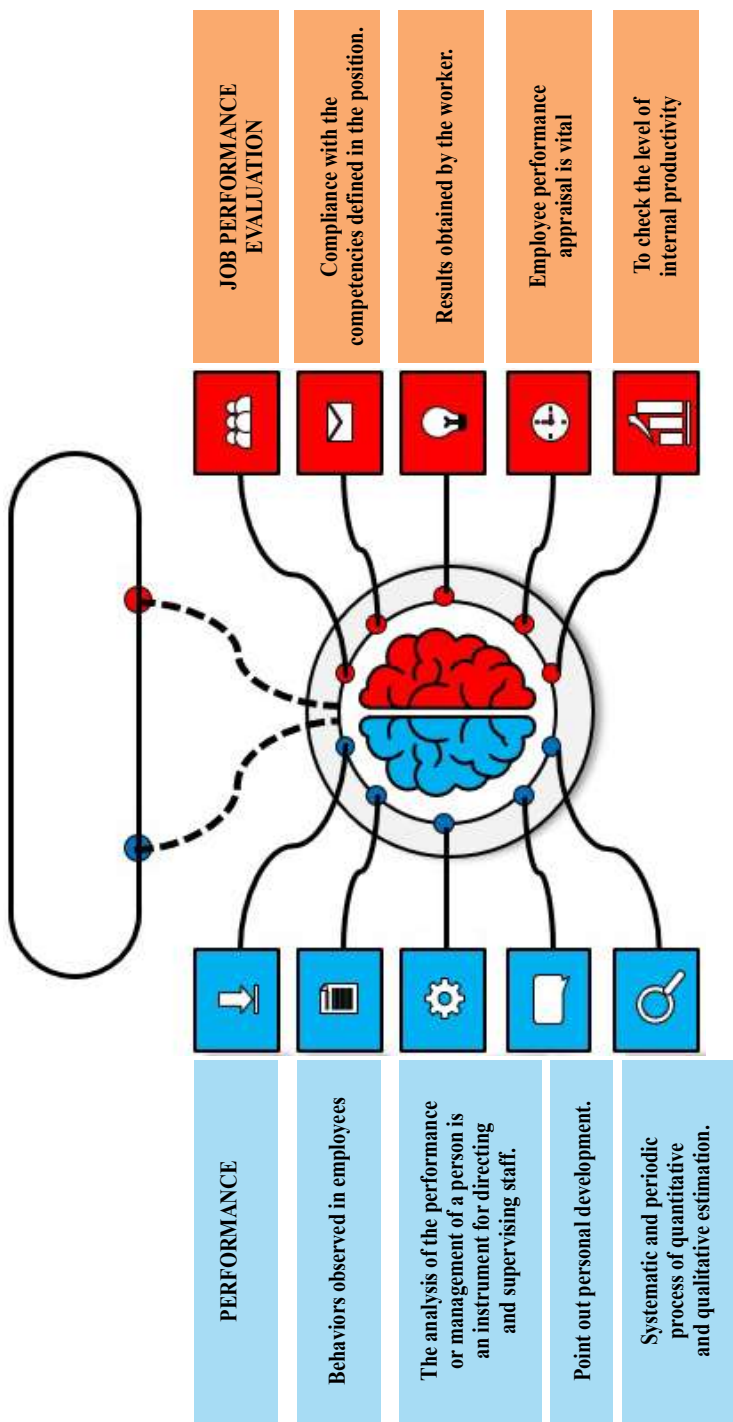
Work Performance: conceptual diagram, broken down into conceptual aspects.
Objectives, analysis, environment



Aspects of Job Performance: conceptual diagram, broken down into conceptual aspects.



Prepared by: The authors:



4.11 PERFORMANCE METERS AND INDICATORS, CASE STUDIES

Performance indicator definitions

Bonnefoy (2006), states that performance indicators are instruments for measuring the main variables associated with the fulfillment of the objectives, which in turn constitute a specific qualitative or quantitative expression of what is intended to be achieved with a specific established objective.

On the other hand, for the Performance Evaluation Technical Unit. (2015), a performance indicator is the quantitative expression built from quantitative or qualitative variables that provides simple and reliable means to measure achievements (compliance with established objectives and goals), reflect the changes linked to the actions of the program, monitor and evaluate its results .

Carrillo Bautista, M. and García Cediél, G. a. (2016), mentions that it is an instrument for measuring the main variables associated with meeting the objectives and which in turn constitute a quantitative and/or qualitative expression of what is intended to be achieved with a specific established objective.

Furthermore, according to Bruusgaard (1995), IDs have been created to establish the comparison of quantitative elements in different combinations. The ID's proposal is to analyze the data to clarify the results and performance of the library and to see how well the library is performing.

To McClure (2001) PIS are management tools that deal with inputs (indicators in relation to essential resources to provide a service), processes or activities (how a resource is used), service indicators resulting from the use of those resources and the impact (the effect of those outputs on other variables or factors).

Likewise, Lakos (1997) discerns input measurements such as personnel, materials, and financial resources; output measurements, such as the results or products of library operations; and performance or impact capacities such as the effects of the outputs on users. The users make of the outputs, or the degree of satisfaction experienced by users of the library.

According to Gil Agudelo, (2011), the performance indicators allow the follow-up and animation of the strategy deployment in operational actions. The strategy is translated into objectives. The objectives are translated into action plans, and these indicators allow the outcome of the action plans to be measured.

In summary, performance indicators are important because they provide an objective way to measure job performance, focus on key results, support informed decision making, identify strengths and areas for improvement, and ensure alignment with organizational goals. These metrics are valuable tools for assessing and continually improving individual and collective performance in an organization.

In conclusion, it can be stated:

1. Performance indicators are those that measure whether an organization, unit, project or person is achieving its goals and fulfilling its strategic objectives. These indicators can focus on the general performance of the company or on the processes in each department, and also provide information on performance in a more significant way that allows organizations and investors to understand whether or not their organization is meeting the goals it has defined and with this, it must be taken into account that these indicators are essential instruments and tools for decision-making in an organization. (Endara, C)
2. Performance indicators are important management tools that provide a reference value from which a comparison can be made between planned goals and achieved performance. They are essential in any performance evaluation that you want to carry out, since their proposal is to analyze the data to clarify the results and performance of the library and see how well the library is carrying out its performance. (Moya, J)
3. A performance indicator is an evaluation and decision support instrument with in order to measure a situation at a specific moment, it must be quantifiable and objective. (Vargas, a)
4. Performance indicators are artifacts that provide quantitative information on the development and achievements of an organization, program, activity or plan in favor of the population or the object of its participation, within the scope of its strategic goals and its task. (Lombeida, D)
5. Performance and management indicators are tools that help to know how the company's resources are being managed and how is the per-

formance and capacity of a company producing a certain good or service efficiently, it also allows knowing specifically which area of the company is the one not working at its full capacity and allows determining how to correct, or deal with those problems (Moya B.)

6. Performance indicators are ways to measure whether an organization, unit, project or person is achieving its strategic goals and objectives, they are also essential tools for decision making, they help reduce the complexity of organizational performance to a small number of key indicators, KPIs facilitate decision making and ultimately help improve organizational performance. (Valley, D)
7. The performance indicators are instruments that allow verifying and controlling the processes or activities of the companies to comply in a prolonged way with all the proposed objectives and to be successful in the market. Even so, the financial part is not interfered as it is a key factor that intervenes to determine the budget of each strategy and verify if that task is real.
8. Performance indicators are instruments that allow evaluating the processes of profitability, productivity, quality, etc. All with the aim of satisfying the needs of its clients, which provides quantitative information regarding the results of its activities.
9. One of the main indicators to consider in a performance evaluation is the KPI (Key Performance Indicator), which measures productivity, performance and the objectives achieved by a collaborator, team or company. These goals can be evaluated by area or position, as well as financial goals or business goals. Evaluating KPI helps compare previously set goals with currently achieved goals. In this way, it will be possible to see if we are obtaining the expected results and if not, there is the possibility of avoiding them and creating a new strategy to achieve them.
10. Performance indicators are management tools that measure whether a company has achieved its goals or objectives, and also help in making decisions to direct its resources in the best way, thus working efficiently and effectively. (Solorzano, M)

11. Performance indicators are means, instruments that allow evaluating to what extent the strategic objectives are being achieved; these indicators allow you to measure the quality of your work, productivity, as well as being key to optimizing decision-making, and knowing the needs of employees and improving the management of human resources. (Atupaña, M).
12. Performance indicators are management tools that are responsible for measuring compliance with the established objectives and goals of an organization, they form a quantitative or qualitative expression of what is intended to be achieved. (Paguay, K)
13. The indicators are tools that help verify the correct functioning of the objectives and at the same time also verify if productivity has improved for the benefit of the company. With them you can improve, and control and the activities of the company in a better way always seeking the fulfillment of objectives. (Sinaluisa, R)
14. The indicators are instruments that provide quantitative information on the development and achievements of an institution, program, activity or project in favor of the population or object of its intervention, within the framework of its strategic objectives and its Mission (Yungan, L)
15. A performance indicator is an evaluation and decision support tool that allows a situation to be measured in a short time or over time. This must be quantifiable and objective, so that it allows monitoring of the different variables and comparison between indicators. (Yepez. D)
16. Quality indicators or key business indicators can be used and applied in any business area and productive sector, although they are used very commonly in online marketing. (Quishpe, J.)

What to consider

Types	Revision	Focus	Purpose
Strategic Planning	Overall performance of the organization	Long term (annual)	Setting of vision and mission
Functional Planning	Performance of functional areas	Short and medium term (Monthly or semiannual)	Support of the functional areas for the achievement of the strategic goals of the organization
Working Planning	Individual performance of employees, equipment, products, services and processes	Daily (Weekly, daily, hours)	Alignment of the performance of employees, teams, products, services and the goals of the organization and functional areas

Practical cases

LOYALTY RATE

Ferretería Roldan wishes to know the loyalty index of its clients, for this it carried out surveys in which the frequency of purchase was reflected.

Loyalty index = (Number of customers x number of total purchases) / 100

Customers	Total Purchases	Index	Percentage
14	6,000.00	840	84%

RETURN RATIO

Throughout the month, two customers made claims for product failures

Claims ratio = (Claims / purchases) x 100

Claims	Buys	Rate	Percentage
one	54	1.85	19%
one	69	1.45	14%

SALES PROFITABILITY RATIO

Ferretería Roldan started its activities buying material from its suppliers, at one time its sales increased, this company wants to make a loan but does not know how profitable its sales are on a monthly basis.

$$\text{Sales profitability ratio} = [(\text{Sales} - \text{Costs}) / \text{Sales}] \times 100$$

Amount	Product	PC	PV	Monthly sales	Rate
25	teflon	0.3	0.39	0.39	23.08
36	screws	0.5	0.65	19.5	97.44
70	tape	0.55	0.72	21.45	97.44
45	connectors	0.34	0.44	13.26	97.44
36	switch	0.45	0.59	17.55	97.44
35	couplings	0.15	0.20	5.85	97.44

CASE STUDY

The worldwide known Coca Cola company is one of the pioneers in performance evaluation and is also a modern company in this type of evaluations and has seen an increase in its production and loyalty to its workers.

1. Self-evaluation

Each one of its collaborators performs a self-evaluation of how he/she has been working in a certain period of time, with respect to established parameters.

2. Evaluation by objectives

Each one of the workers has his own objectives through this the evaluator estimates the fulfillment of these in case of not being fulfilled there is a feedback to improve the worker and to be recognized.

3. 360° Evaluation

(90) Each part of coca cola has its responsible seeing that assigned tasks have been fulfilled as is the development in front of the position you have, (180) Gather the employees of the same field to be evaluated share opinions of their work and what they can improve. (270) gives an assessment of their bosses with higher position that has contact with them a respectful meeting.

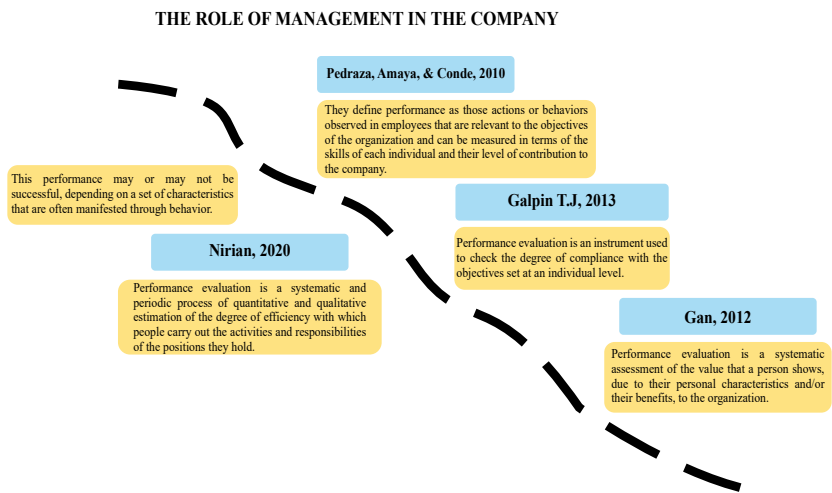
4. Evaluation for worker satisfaction

The employee is called with his evaluation to see if he feels fulfilled in case he does not feel he can be helped with some incentive.

5. Annual evaluation Check Inns

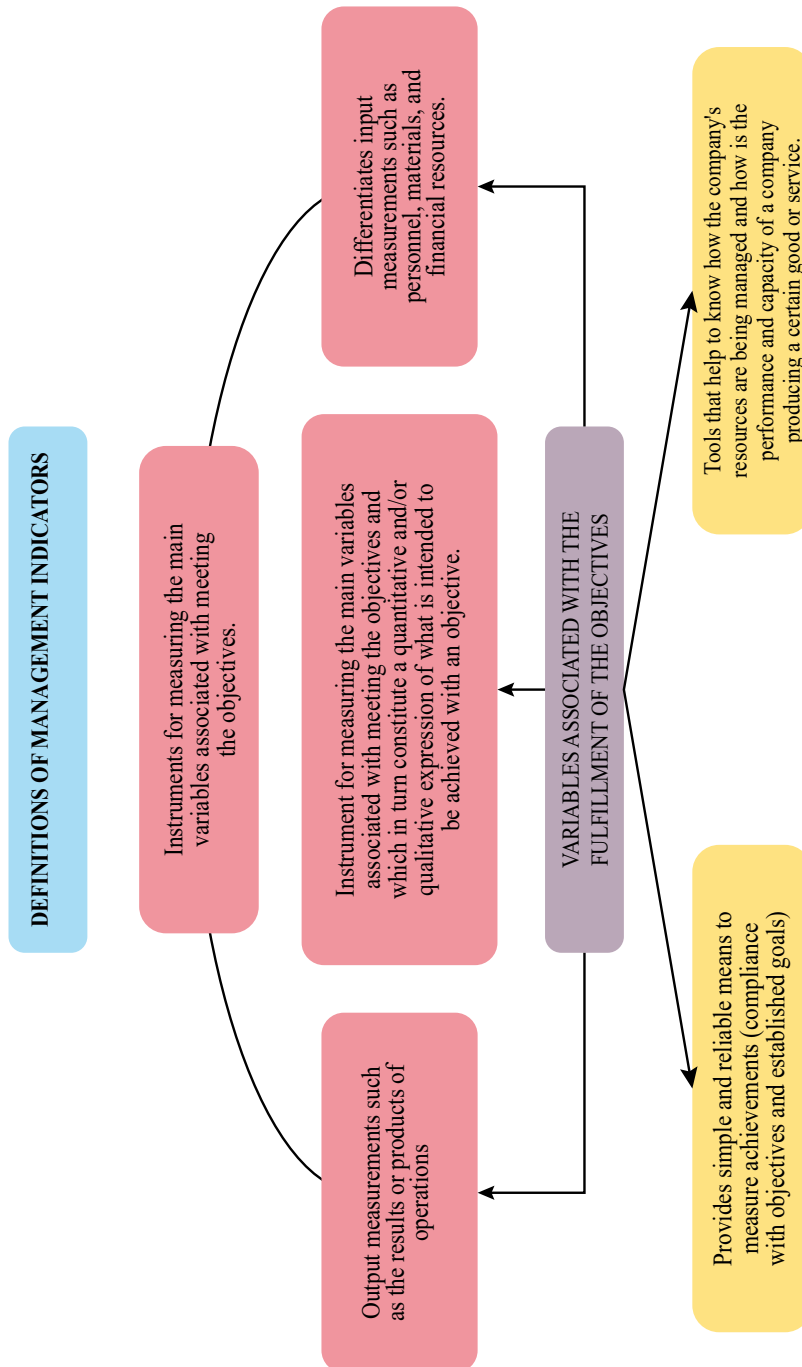
Evaluation so that the leaders and workers know about the company in general and the superiors can solve problems (Villanueva, 2022).

GRAPHIC ORGANIZERS
The role of management in the company: conceptual diagram, broken down into conceptual aspects.

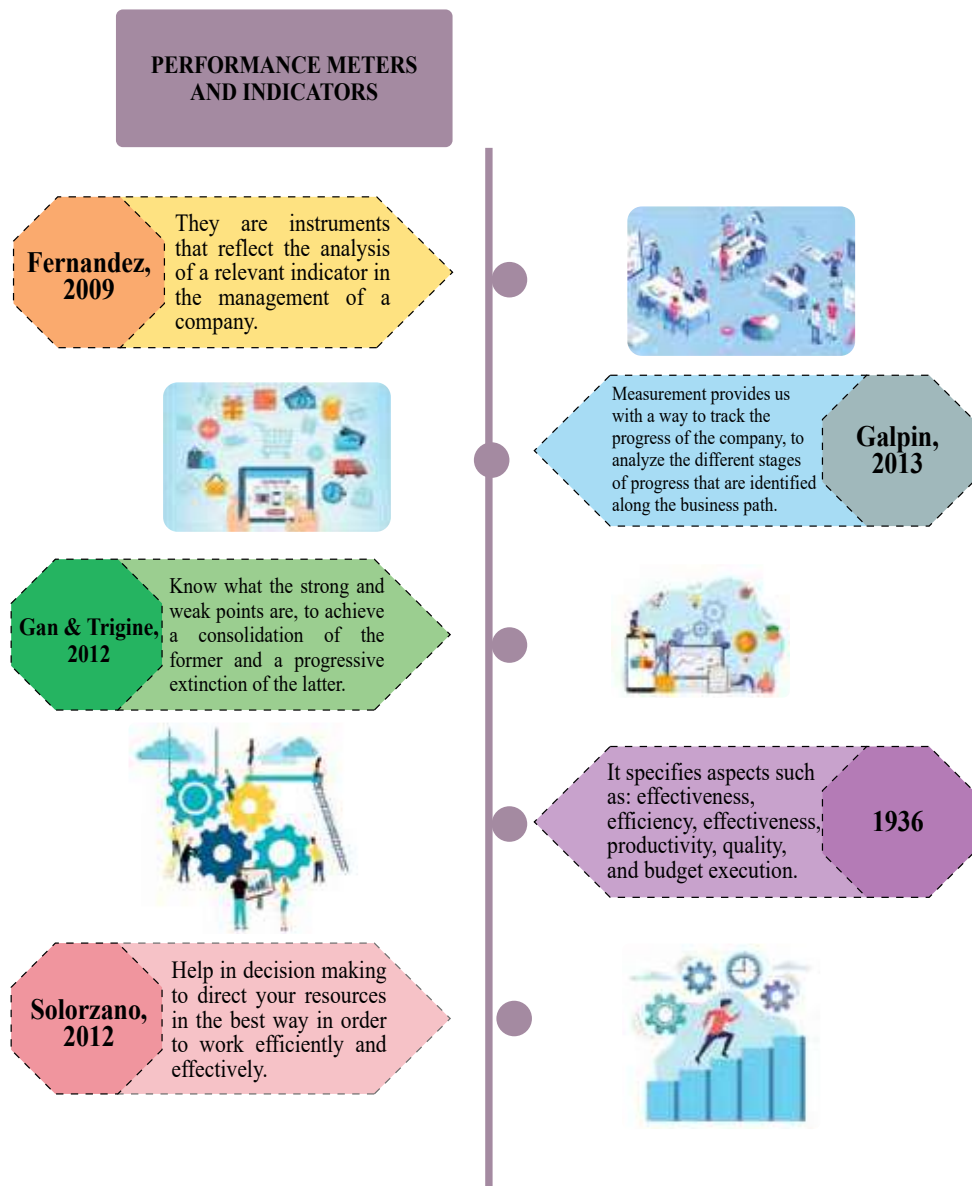


Prepared by: The Author

Definitions of management indicators: conceptual diagram, broken down into conceptual aspects. Instruments, measurements, outputs



Definitions of management indicators: conceptual diagram, broken down into conceptual aspects. Instruments, measurements, outputs



Prepared by: The authors

GLOSSARY

Organizacional: Se denomina organizacional a todo lo referido al establecimiento de un orden para llegar a conseguir un objetivo específico.

Lucrativo: entidad organizativa que busca obtener ganancias monetarias y financieras en el tiempo, ya sea a través de la venta o, la oferta de servicios, bienes y productos.

Adaptabilidad: capacidad de responder adecuadamente a las exigencias del entorno, regulando el comportamiento para lograr la homeostasis

Estratégico: De importancia decisiva para el desarrollo de algo

Tratadista: Autor que escribe tratados sobre una materia determinada.

Relativo: El relativo el que y sus variantes (la que, los que, las que), puede tener como antecedente tanto una persona como una cosa

Entorno: es un nombre con el significado de ‘ambiente, lo que rodea

Concurrente : Coincidencia, concurso simultáneo de varias circunstancias

Consecución: Alcanzar, obtener o lograr lo que se pretende o desea

Interfuncionales : capacidad de los sistemas de facilitar el intercambio de información y la aplicación recíproca de ésta.

Eficaz : la capacidad de lograr el efecto que se desea o se espera

Eficiencia: capacidad de disponer de alguien o de algo para conseguir un efecto determinado

Raciocinio: es una operación mental, que nos permite pasar de unos juicios a otros, formando nuevos juicios.

Rentabilidad : es el beneficio obtenido de una inversión

Delegarla : Dar la jurisdicción que tiene por su dignidad u oficio a otra, para que haga sus veces o para conferirle su representación

Demográficos : Es un conjunto de datos que vinculan el tamaño y crecimiento poblacional con la dinámica de los componentes que intervienen (fecundidad, mortalidad y migraciones), así como los efectos en su composición (por sexo

y edad, lugar de nacimiento, situación conyugal) y los hogares.

Roles: funciones que le son atribuidas a una persona para que se comporte de acuerdo a unas pautas y en base a unas expectativas

Vocero : Es aquel que funge como la voz oficial de la Institución y es la fuente de información oficial en temas de diversa naturaleza, siendo responsable de proyectar y apoyar la construcción de una imagen positiva de la Institución, así como de potenciar las cualidades de la Dependencia.

Faceta: Aspecto, punto de vista desde el que se puede examinar un asunto

Jerarquía: estructura que se establece en orden a su criterio de subordinación entre personas, animales y valores

Cortoplacista : Que persigue resultados o efectos a corto plazo

Espontáneo: algo natural y sincero en el comportamiento o en el modo de pensar

Subordinado: Persona con una posición laboral o jerarquía más baja que otra persona, de la cual recibe órdenes

Precepto: Cada una de las instrucciones o reglas que se dan o establecen para el conocimiento o manejo de un arte o facultad

Matricial: estructura de empresa donde los equipos dependen de varios líderes

Acrónimo: término formado por la unión de elementos de dos o más palabras.

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