

Principles of Management

2025-2026



**Lisbon School
of Economics
& Management**
Universidade de Lisboa

Lecturer

Practical Classes



(carlosfreire@iseg.ulisboa.pt)

Carlos Robalo Freire

CEO at AON Portugal

Over 35 years of experience in the Financial Sector (Insurance and Banks)

Teach: Strategic Management, Leadership & Negotiation, Management Control

PhD in Management

Master at Insead

EFFAS Certified ESG Analyst

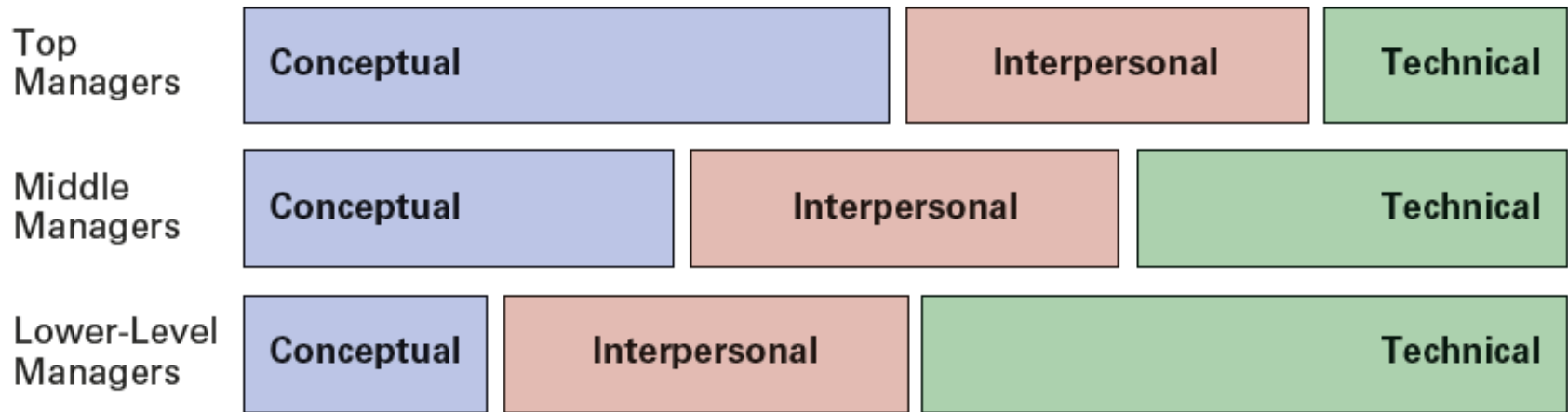
Aon PLC is an US multinational financial services firm that sells a range of risk-mitigation products, including Commercial Risk, Investment, Wealth and Reinsurance solutions, Aon has approximately 50,000 employees in 120 countries.

Learning Objectives

- 1.1 Describe** who managers are and where they work.
- 1.2 Explain** why managers are important to organizations.
- 1.3 List** the functions and roles of managers.
- 1.4 Describe** the factors that are reshaping and redefining the manager's job.
- 1.5 Identify** career options in management and skills that lead to career success.
- 1.6 Explain** the value of studying management.

Exhibit 1-8 Skills Needed at Different Managerial Levels

Exhibit 1-8 shows the relationships of conceptual, interpersonal, and technical skills to managerial levels.

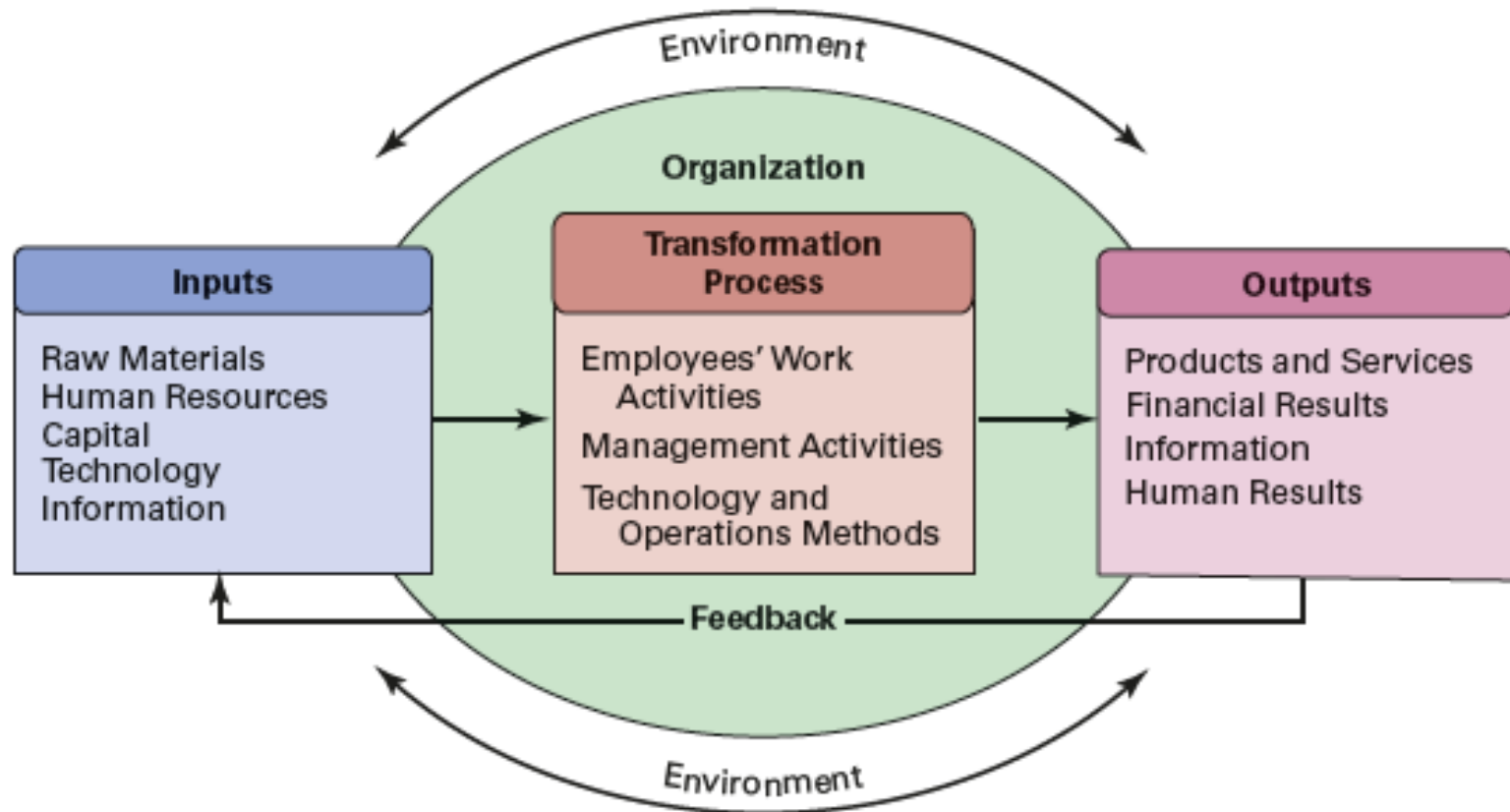


- **Technical skills**
 - Knowledge and proficiency in a specific field
- **Interpersonal skills**
 - The ability to work well with other people
- **Conceptual skills**
 - The ability to think and conceptualize about abstract and complex situations concerning the organization

Challenges Facing Managers Today and into the Future

- Focus on remote or hybrid work
- Focus on technology
- Focus on employee well-being

Exhibit 2-5 An Organization as an Open System



Sustainability and the ESG Movement

- The sustainability movement is now a global trend that is reshaping the business environment
- Many companies are using environment, social, and governance (ESG) reporting frameworks, which measure and quantify a company's commitment to environmental sustainability, social responsibility, and good corporate governance.

Principles of Management - Course Program

Class	Summary
1	Welcoming / Presentations
2	Chapter 1 - The Manager and the Organization
3	Chapter 1 - History of Management Module
4	Chapter 2 - The Decision-Making Process
5	Chapter 3 - The External Environment and Organizational Culture
6	Chapter 4 - Management in a Global Environment
7	Chapter 5 - Managing Diversity
8	Chapter 6 - Social Responsibility and Ethics
9	Chapter 7 - Managing Change and Disruptive Innovation
10	Chapter 7 - Managing Change and Disruptive Innovation
11	Chapter 8 - Planning + Chapter 9 - Strategy
12	Chapter 18 - Monitoring and Controlling
13	Chapter 11 - Organizational Design
14	Chapter 11 - Organizational Design
15	Chapter 12 - Human Resource Management
16	Chapter 13 - Managing Groups and Teams
17	Chapter 13 - Managing Groups and Teams
18	Chapter 15 - Understanding and Managing Individual Behavior
19	Chapter 15 - Understanding and Managing Individual Behavior
20	Chapter 16 - Motivating Employees
21	Chapter 16 - Motivating Employees
22	Chapter 17 - Leaders and Leadership
23	Chapter 17 - Leaders and Leadership
24	Q&A

Part 1 Introduction to Management

Chapter 1: [Managers and You in the Workplace](#)

Chapter 2: [The Evolution of Management](#)

Chapter 3: [Making Decisions](#)

Part 1 Management Practice

Part 2 Basics of Managing in Today's Workplace

Chapter 4: [Influence of the External Environment and the Organization's Culture](#)

Chapter 5: [Diversity, Equity, and Inclusion](#)

Chapter 6: [Managing in a Global Environment](#)

Chapter 7: [Managing Social Responsibility and Ethics](#)

Part 2 Management Practice

Part 3 Planning

Chapter 8: [Foundations of Planning](#)

Chapter 9: [Managing Strategy](#)

Entrepreneurial Ventures Module

Part 3 Management Practice

Part 4 Organizing

Chapter 10: [Designing Organizational Structure](#)

Chapter 11: [Managing Human Resources](#)

Chapter 12: [Managing Change and Innovation](#)

Part 4 Management Practice

Part 5 Leading

Chapter 13: [Understanding and Managing Individual Behavior](#)

Chapter 14: [Motivating Employees](#)

Chapter 15: [Managing Groups and Teams](#)

Chapter 16: [Being an Effective Leader](#)

Chapter 17: [Managing Communication](#)

Part 5 Management Practice

Part 6 Controlling

Chapter 18: [Management Control](#)

Planning and Control Techniques Module

Managing Operations Module

Part 6 Management Practice

Principles of Management - Course Evaluation

Normal Season (EN) 09/Dec/2025 (09:00 - 11:00)

- In-class participation: 10%
- Group work presentation (5 students each): 30%
- Group work discussion: 10%
- **Exam EN:** 50% or 100% (Whatever the student benefits the most)



Appeal season (ER) 06/Jan/2026 09:00 - 11:00

- **Exam ER:** 100%

[The student may benefit from the same 50/50 logic (as stated above) if it does not succeed in getting approved in the normal season.]

Additional notes

All students can take both Exams (i.e. EN & ER), regardless of whether they have qualified and are attributed an internal evaluation or not. To have an internal evaluation, the student is required to have a minimum evaluation of 8/20 in 'in-class participation', 'group work presentation', and group work discussion'. To benefit from the internal evaluation, the student is required to have a minimum evaluation of 8/20 in the exam. Final grades superior to 18 points are required to be confirmed with an additional oral examination, with the coordinator of this course.

The case analysis consists of:

- (1) a **written report** analyzing a company based on an interview structured around a chapter/topic from our program – the topics will be identified and advertised in due time;
- (2) an **oral presentation** of this analysis to the class; and
- (3) a **discussion** of another group's analysis/report. To complete this assignment, students should...

After forming groups (5 students):

- ✓ Prepare a written report (Word) about the analyzed company, up to 2500 words (cover, index, references, and appendices not included).
- ✓ Prepare a presentation for the class and the instructor (e.g., Powerpoint) with a maximum duration of 15 minutes.
- ✓ Critical discussion, between 5 to 7 minutes, of someone else's case.

Note about deadlines: The written report must be sent, in its final version, to the Instructor and to the group responsible for its discussion by the date and time of the previous practical class (i.e., 7 days before). The presentation must be sent to the Instructor at least by 11:59 pm the day before.

Principles of Management - Groups

	Group 1 (Managing Diversity)
59893	ANA MARGARIDA DA SILVA RODRIGUES
66256	SOFIA RIBEIRO BAPTISTA DE ALMEIDA SOUSA
66257	SALVADOR BARBOSA FRANCISCO DE FIGUEIREDO CARVALHO
65749	JOSHUA COOK
66264	CLARA LEONEL GRILO

	Group 2 (Managing Diversity)
66268	BERNARDO FAUSTINO CAETANO
66260	ELISA MARTINELLI
66264	FILIPA MARTINS VILAS RODRIGUES
66261	FRANCISCA LIMA LOPES CORREIA DE ABREU
66259	FRANCISCO AFONSO SANTOS MOTA

	Group 3 (Social Responsibility+Sustainability)
66260	CAROLINA MALTEZ MOURO SANTOS SILVA
66279	JOANA CHENG XIA
65725	PERNILLE LYKKE
66253	SANTIAGO MIGUEL CANDEIAS MOURATO CAVALHEIRO MARQUES
66265	RAFAEL DA COSTA SANTOS

	Group 4 (Strategy)
66261	DAVID FIGUEIREDO JAQUES
66251	MYKHAILO TAIDONOV
66254	RITA BARREIRA DA SILVA CHAINHO
66258	MARIANA FILIPA LISBOA DIAS
66252	SOFIA BARBOSA ALVAREZ

	Group 5 (Strategy)
66274	PEDRO FILIPE DE ALMEIDA PEREIRA
66270	MARTIM JÚLIO CORREIA
66271	MADALENA MAYOR REGO SOUSA DUARTE
65638	MARIA - NEFELI CHRYSOVERGI-SIMIRTZAKI
66278	MARIA DO CARMO DE ALMEIDA CÉSAR

	Group 6 (Human Resources Management)
66259	DINO DOS SANTOS FERNANDES
66276	MARIA FRANCISCA DA SILVA VIDEIRA
66262	LUÍSA ALEIXO REI PAULO DA SILVA
66266	FRANCISCO MARIA DIOGO FRADE
66267	HUGO MIGUEL GONÇALVES ALGARVIO

	Group 7 (Human Resources Management)
66263	FRANCISCO OSÓRIO NAVE FERREIRA
66272	INÊS DO CARMO SANTOS DE FREITAS
66269	JOANA HENRIQUES SANTOS
66275	JOÃO VICENTE SIMÕES DOS REIS

Principles of Management – Important Information



It's a global organization that accredits the best business schools in the world

Written communication quality (emphasis on structure and reasoning)

Written communication quality (emphasis on english)

Ethical dilemma identification and discussion / analysis quality

International / culture nuance identification and consideration

Communication Rules



Agenda

1. Oral Communication
2. Written Communication
 - a. Bibliographic References
 - b. Tables

Communication Rules

1. Oral Communication



Source: <https://unsplash.com/s/photos/student-presentation>

1. Oral Communication

Message and Supporting Materials

- The key message should be **clear**, and the presentation should be **logically structured**, emphasizing **the most relevant topics**;
- The PowerPoint should follow the KISS principle (*keep it simple and straight*):
 - Avoid animations.
 - Use minimal text per slide.
 - Use a font size that is legible for those at the back of the room.
 - Include images with high resolution and quality.

Note: Depending on the content of the slides, you can generally consider that **20 minutes of presentation correspond to 20 slides**.

1. Oral Communication

Verbal Behavior

- **Avoid reading notes** (at most, you can have cards with key points).
- **Do not read the PowerPoint slides** – they are a supplement, not the presentation itself.
- **Clarity** of speech and modulation of **voice** are important – do not present in a monotone tone.
- Avoid overusing jargon and colloquialisms.
- Respect the allocated presentation **time**.
- The **introduction** should **capture** the audience's attention.
- The **conclusion** should **summarize** the main arguments.

1. Oral Communication

Nonverbal Behavior

- Maintain appropriate posture, movement, and body language.
- Use gestures with restraint (use gestures to emphasize or complement an idea).
- Maintain **constant eye contact with the audience**, ensuring everyone is within your line of sight (avoid focusing only on one person, turning your back to the audience, etc.).

Note: Presentations naturally tend to improve with experience and a deep mastery of the presentation's content. **The key lies in preparation!**

2. Written Communication



Source: <https://unsplash.com/s/photos/good-communication>

2. Written Communication

Literacy and Style

- Write **without errors** (grammatical, spelling, or punctuation).
- Write clearly, concisely, and fluidly.
- Use short sentences with precise yet simple language. One sentence, one idea.

Note: **Never submit a report without reviewing it...** and you can take advantage of some existing tools in Word (for example, read aloud).

2. Written Communication

Structure of the report

- Cover Page
- Table of Contents
- Introduction
- Development
- Conclusion
- Bibliographic References
- Appendices

Note: Later, we will address the content of the sections in a report.

2. Written Communication

Bibliographic References in the Body of the Text

All references to concepts and original ideas from authors must be cited (Example: Silva, 2000).

Citations in the body of the text (verbatim quotations) should be enclosed in quotation marks and written in regular font (not italics), followed by the author(s), date, and page numbers (Example: Silva, 2000: 13-14).

Long quotations (5 or more lines) should be separated from the text, forming an independent paragraph, indented, with a smaller font size, and without quotation marks.

2. Written Communication

Bibliographic References

According to Jones (1998), students have difficulty citing.

or

Students have difficulty citing (Jones, 1998).

In-text citations: "Students typically have difficulty using the APA style" (Jones, 1998: 199-200).

Bibliographic References

- Long quotations

>Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vivamus imperdiet id velit cursus varius. Morbi tristique convallis sapien a suscipit. Maecenas aliquam erat ac tellus sagittis, sed fringilla nibh iaculis. Vestibulum ex nisi, ultrices nec velit at, rutrum sodales sem. Donec nulla enim, luctus id ligula sit amet, semper consectetur felis. Pellentesque eleifend egestas ligula at fringilla. In at dictum urna. Jones's (1998) study found the following: (Signal phrase)

(Entire
quotation
indented
1/2 inch)

Students often had difficulty using APA style, especially when it was their first time citing sources. This difficulty could be attributed to the fact that many students failed to purchase a style manual or ask their teacher for help. Nulla egestas facilisis sagittis.

Suspendisse auctor tincidunt purus, ac efficitur lectus eleifend ac. Morbi eleifend posuere ipsum, eget molestie arcu tincidunt eu. (p. 199) (Parenthetical follows ending punctuation)

Orci varius natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec aliquam lectus nisl. Nulla ac vehicula purus. Cras vitae nunc quam. Mauris scelerisque lorem ut tellus tincidunt, ut sodales felis molestie. Maecenas ac sodales nibh. Sed at vulputate turpis. Proin libero nulla, mattis nec lectus sed, tincidunt aliquam felis. Nulla augue quam, dignissim sed cursus ac, commodo quis odio. Duis porta mollis metus, a lobortis ante hendrerit id. Ut vitae sodales sapien. Praesent facilisis erat non justo molestie laoreet. Sed maximus placerat suscipit. Quisque vitae ex sed velit ornare luctus a nec lacus. Fusce posuere vel diam sed vulputate. Donec eu malesuada dolor, in aliquam nulla. Nunc interdum ornare massa et finibus. Donec

Bibliographic References

Bibliographic references at the end of the work

- **Articles published in scientific journals**
 - Author(s). (Year of publication). Title of the article. Title of the Journal, Volume(Issue), Page numbers.;
 - **Example:** Galí, J. (1994). Monopolistic Competition, Endogenous Markups, and Growth. *European Economic Review*, 38 (3-4), 748-756.

Exercise:

What is the correct bibliographic reference?

- Articles Published in Scientific Journals

- <Author(s)> (<Year of Publication>). <Article Title>. <Journal Name>, <Volume>(<Issue>), <Pages>.



International Journal of Research in Marketing

Volume 36, Issue 3, September 2019, Pages 350-366





Full Length Article

The impact of digital transformation on the retailing value chain ☆

Werner Reinartz , Nico Wiegand , Monika Imschloss 

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Solution:

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- Reinartz, W., Wiegand, N., & Imschloss, M. (2019). The impact of digital transformation on the retailing value chain. *International Journal of Research in Marketing*, 36(3), 350-366.



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<Publisher>;

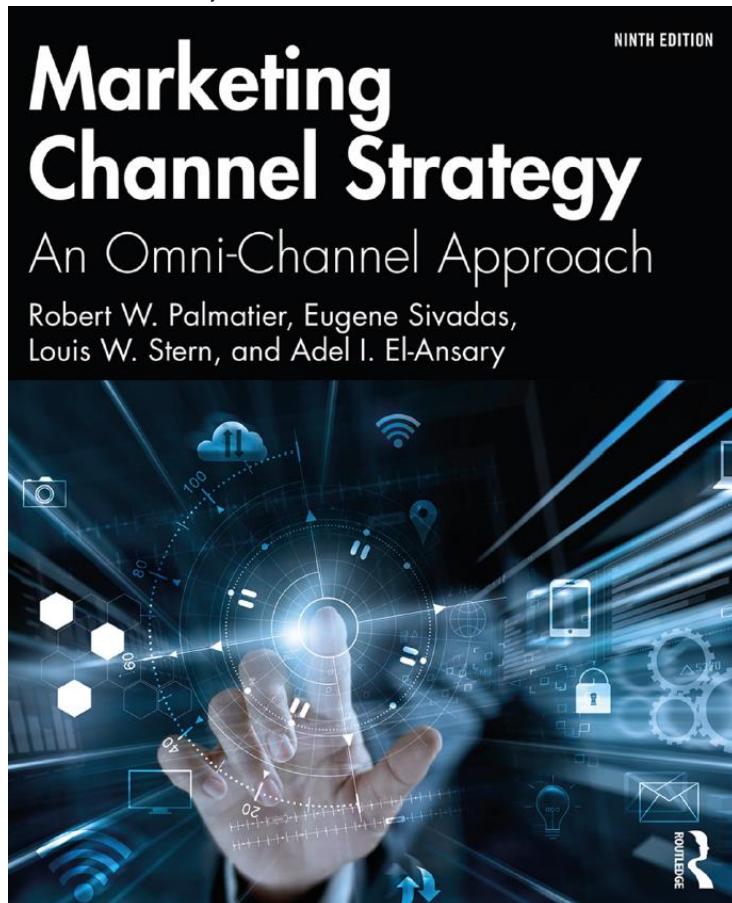
- **Example:** Romer, D. (2012). *Advanced Macroeconomics*, 4th Ed. McGraw-Hill.

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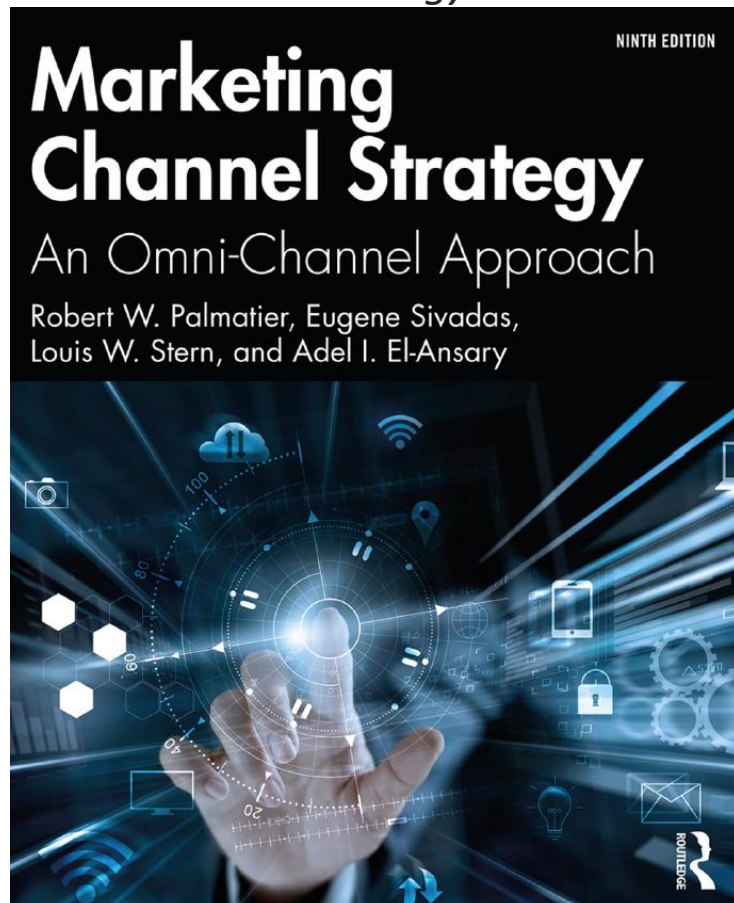
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What is the correct bibliographic reference?

- **Books and Monographs**

- Palmatier, R. W., Sivadas, E., Stern, L. W., & El-Ansary, A. I. (2020). *Marketing Channel Strategy: An Omni-Channel Approach*, 9^a Ed. Routledge.



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Bibliographic References

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Chapters from Edited Books

- <Author(s)> (<Year of Publication>). <Title of the Contribution/Chapter.> In:
<Name(s) of the Editor(s)> (Eds.) <Title of the Edited Book>, <Edition> Edition.
<Publisher>, pp. <Pages>;
- **Example:** Rotemberg, J. & Woodford, M. (1999). The Cyclical Behavior of Prices and Costs. In: Taylor, J. and Woodford, M., (Eds.) *Handbook of Macroeconomics*. Elsevier, pp. 1051-1135.

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- **Chapters in Edited Books with More than One Author**
- <Author(s)> (<Year of Publication>). <Title of the Contribution/Chapter.> In: <Name(s) of the Editor(s)> (Eds.) <Title of the Edited Book>, <Edition> Edition. <Publisher>, pp. <Pages>.

Chapter 3

A Trademark Image Retrieval Tool Based on Deep Learning Features



Rubén Manrique and David Duque-Arias

Abstract In this work, we present the advances in the construction of a trademark image retrieval system using machine learning techniques. This application will be used as a tool by a government entity to identify potential similar trademark images. The similarity is computed via two different types of features: color-based and deep-based features. Furthermore, we included the Pantone color scale as a proxy to identify relevant colors in the image. The algorithm was evaluated using a subset of 5000 images from LLD—Large Logo Dataset (Sage et al., LLD - large logo dataset - version 0.1 [1]), and a ground truth obtained from two surveys applied to users. Based on the NDCG metric, promising results were obtained that validate the set of proposed features.

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33

20. Yu, H., Li, M., Zhang, H.-J., Feng, J.: Color texture moments for content-based image retrieval. In: Proceedings. International Conference on Image Processing, vol. 3, pp. 929–932. IEEE, New York (2002)
21. Eiseman, L., Recker, K.: Pantone: The Twentieth Century in Color: (Coffee Table Books, Design Books, Best Books About Color). Chronicle Books (2011)
22. Simonyan, K., Zisserman, A.: Very deep convolutional networks for large-scale image recognition. arXiv preprint [arXiv:1409.1556](https://arxiv.org/abs/1409.1556) (2014)
23. Qian, G., Sural, S., Gu, Y., Pramanik, S.: Similarity between euclidean and cosine angle distance for nearest neighbor queries. In: Proceedings of the 2004 ACM Symposium on Applied Computing, pp. 1232–1237 (2004)
24. Wang, Y., Wang, L., Li, Y., He, D., Liu, T.-Y.: A theoretical analysis of NDCG type ranking measures. In: Conference on Learning Theory, pp. 25–54 (2013)

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R. Manrique and D. Duque-Arias—Both authors contributed equally.

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Bibliographic References at the End of the Work

- Sources of Statistical Data

- <Author(s)> (<Year of Publication>). <Database Title> [Database], <Version>. <Location>: <Publisher>. Available at: <URL>;
- **Example:** European Commission (2014). *Annual Macro-Economic Database* [Base de dados], February 2014. Brussels: Eurostat. Available at: http://ec.europa.eu/economy_finance/db_indicators/ameco/index_en.htm.

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<Location>: <Publisher>. Available at: <URL>.

icpsr.umich.edu/web/NACJD/studies/6581/versions/V1



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Version Date: Nov 4, 2005  [Cite this study](#) | [Share this page](#)


Principal Investigator(s): 

[Mark A. Cohen](#), Vanderbilt University, Owen Graduate School of Management;; [Ted R. Miller](#), National Public Services Research Institute

<https://doi.org/10.3886/ICPSR06581.v1>

Version V1

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 Analyze Online (0)

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What is the correct bibliographic reference?

- Sources of Statistical Data

- Cohen, M. A., & Miller, T. R. (1991). *Cost of mental health care for victims of crime in the United States, 1991 (ICPSR 6581)* [database], November 2005. USA: NACJD. Available at:
<https://www.icpsr.umich.edu/web/NACJD/studies/6581/versions/V1>

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
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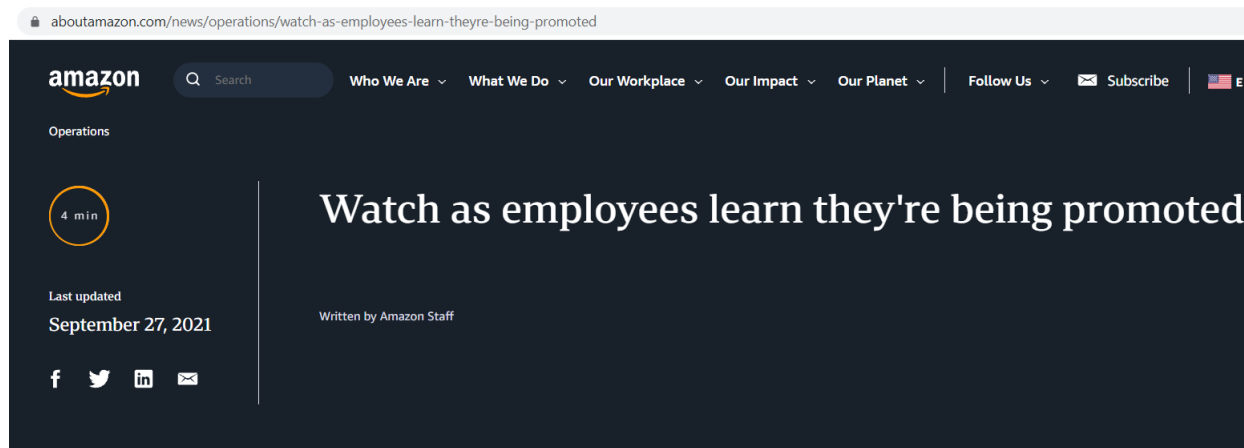
- **Websites and Internet Documents**
 - <Author(s)> (<Year of Publication>). <Title of the Website/Document> [in line]. Available at: <URL> [Accessed on: <access date>];
 - **Example:** University of the West of England (2012). *Guide to Referencing* [Em linha]. Available at:
<http://iskillzone.uwe.ac.uk/RenderPages/RenderConstellation.aspx?Context=10&Area=8&Room=25&Constellation=39> [Accessed on: 2013/3/3].

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- <Author(s)> (<Year of Publication>). <Title of the Website/Document> [in line]. Available at: <URL> [Accessed on: <access date>];



Reading:

Watch as employees learn
they're being promoted



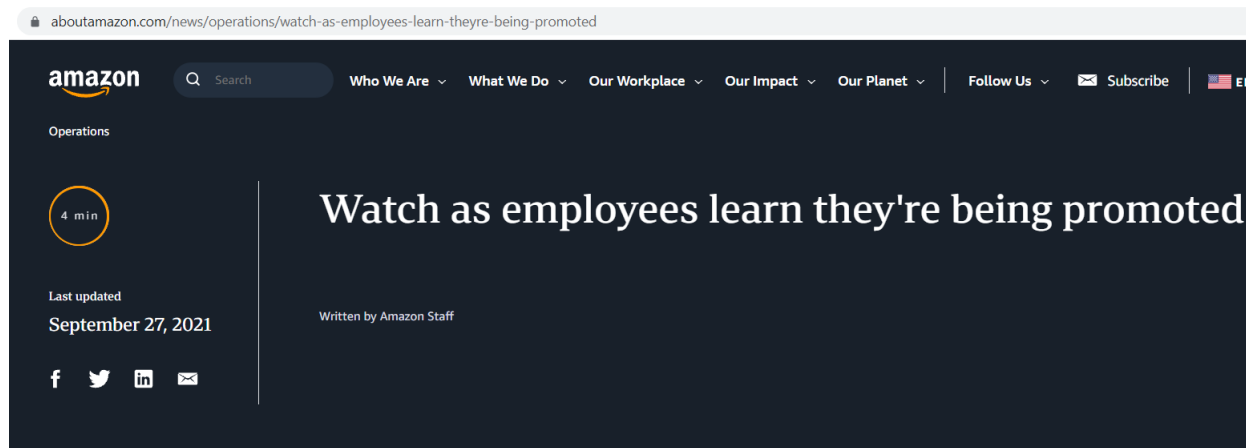
Amazon promotes from within, providing hourly employees with opportunities to advance to higher skill, better-paying roles within the company. See them learn they've earned promotions—when they least expect it.

Solution:

What is the correct bibliographic reference?

- **Websites and Internet Documents**

- Amazon (2021). *Watch as employees learn they're being promoted* [in line]. Disponível em: <https://www.aboutamazon.com/news/operations/watch-as-employees-learn-theyre-being-promoted> [Accessed on: 2021/10/8].



Reading:

Watch as employees learn
they're being promoted



Amazon promotes from within, providing hourly employees with opportunities to advance to higher skill, better-paying roles within the company. See them learn they've earned promotions—when they least expect it.

Bibliographic References

When the same author has more than one reference in the same year

At the end of the document:

- Amazon (2020a). Our planet [in line]. Available at: <https://www.aboutamazon.com/planet> [Accessed on 17/11/2020]
- Amazon (2020b). Amazon's COVID-19 blog: updates on how we're responding to the crisis [in line]. Available at: <https://www.aboutamazon.com/news/company-news/amazons-covid-19-blog-updates-on-how-were-responding-to-the-crisis> [Accessed on 20/11/2020]

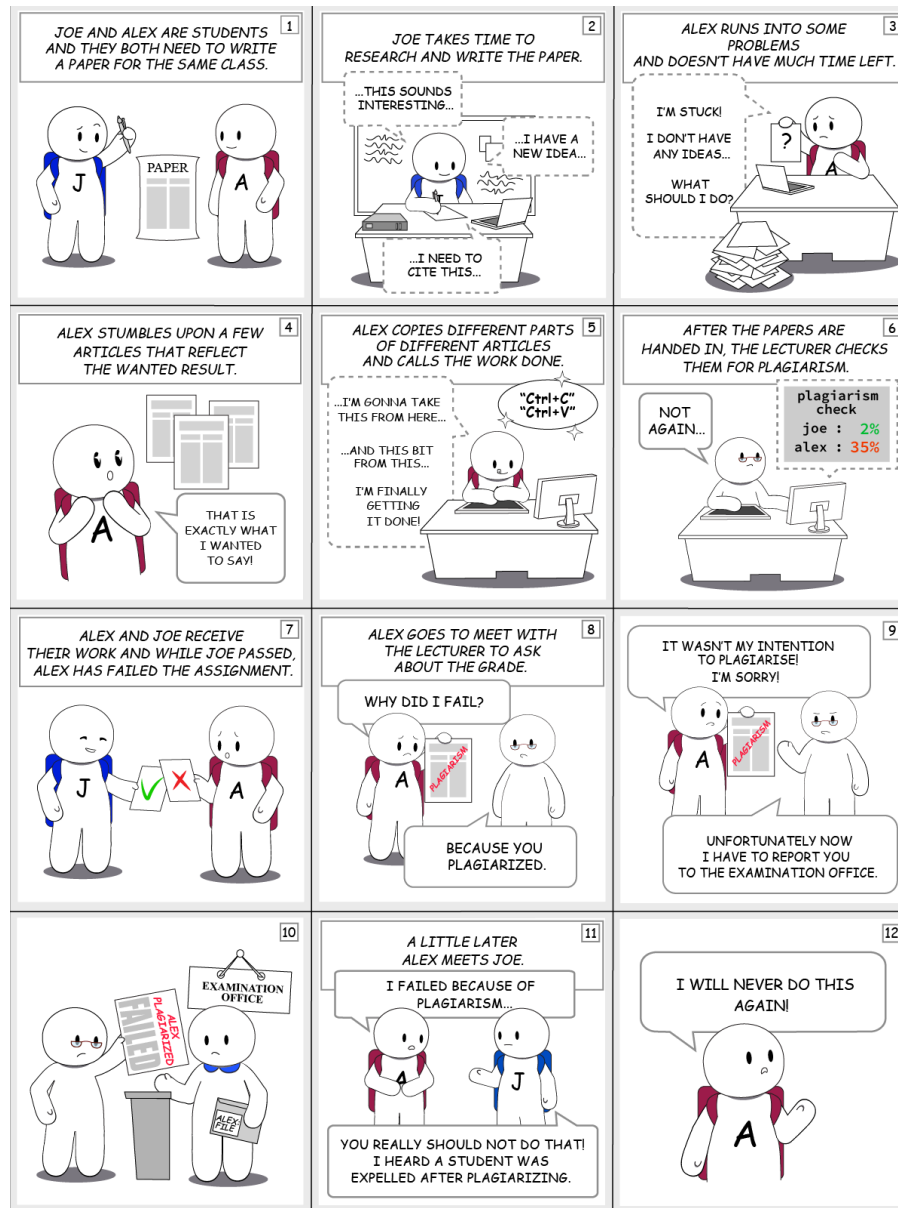
Note: In these cases (a, b, c, etc., from the same author and the same year), the order in which they appear at the end of the document is the same as the order in which they appear in the body of the text (while maintaining alphabetical order).

In the body of the document:

"Amazon invests in sustainability because it is beneficial for the company, the planet, and the customers (Amazon, 2020a). ... (Amazon, 2020b). ... (Amazon, 2020c). ..."

Don't forget

DANGERS OF PLAGIARISM

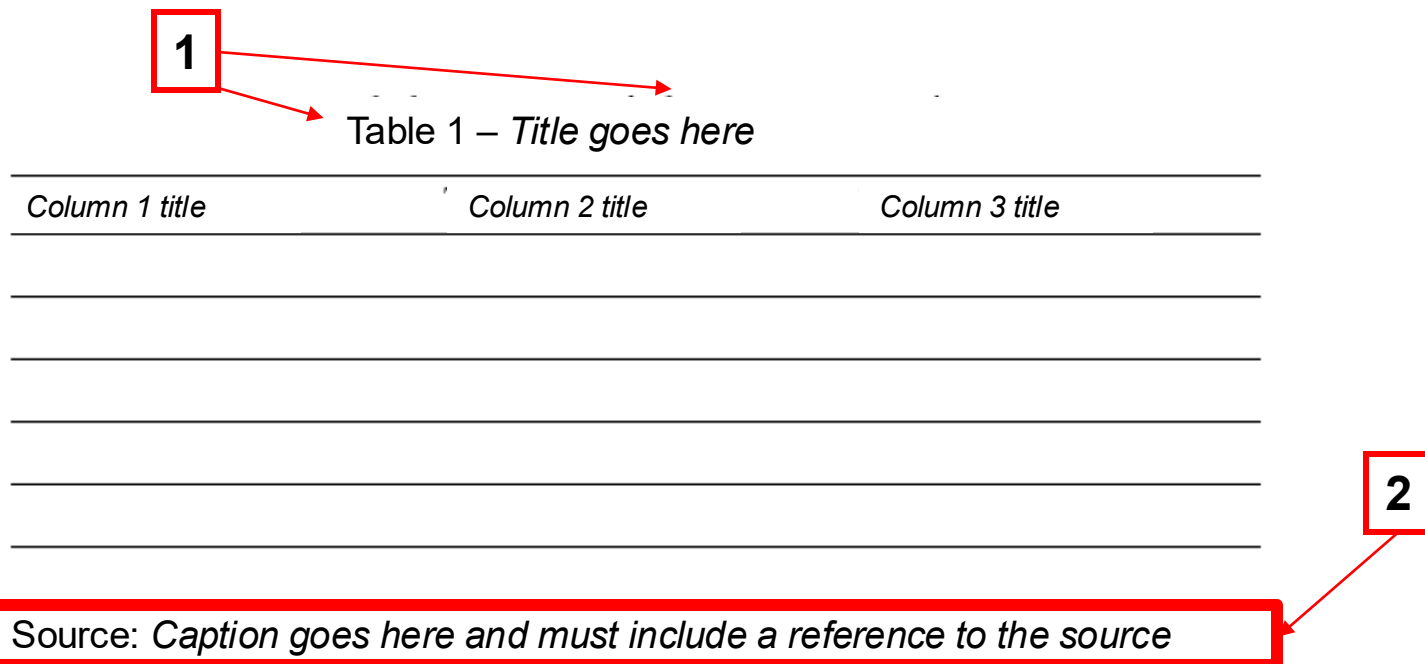


Source:

<https://www.inf.ovgu.de/inf/en/Study/Being+a+student/Incoming/Academic+Integration+to+FIN/DE+Mentoring+Programme/Plagiarism+%28Comic+Strip%29.html>

Tables

- Tables should have a **Roman numeral** for numbering and the title at the top (1);
- A **reference to the source** should be at the bottom (2);
- When tables span to the next page, they should **repeat the first row or header**.



1

Table 1 – *Title goes here*

<i>Column 1 title</i>	<i>Column 2 title</i>	<i>Column 3 title</i>

2

Source: *Caption goes here and must include a reference to the source*

One last tip

- Delivering a good oral presentation requires **practice**;
- **Rehearsing** the presentation beforehand (to gain confidence and comfort with the topic) to check:
 - Control of **timing** and repetitive gestures,
 - Testing the **flow** of the argumentation,
 - Verifying if **all** slides are necessary,
 - Verifying image quality...



**"THANKS. YOUR PRESENTATION
TODAY CURED MY SLEEP DISORDER."**

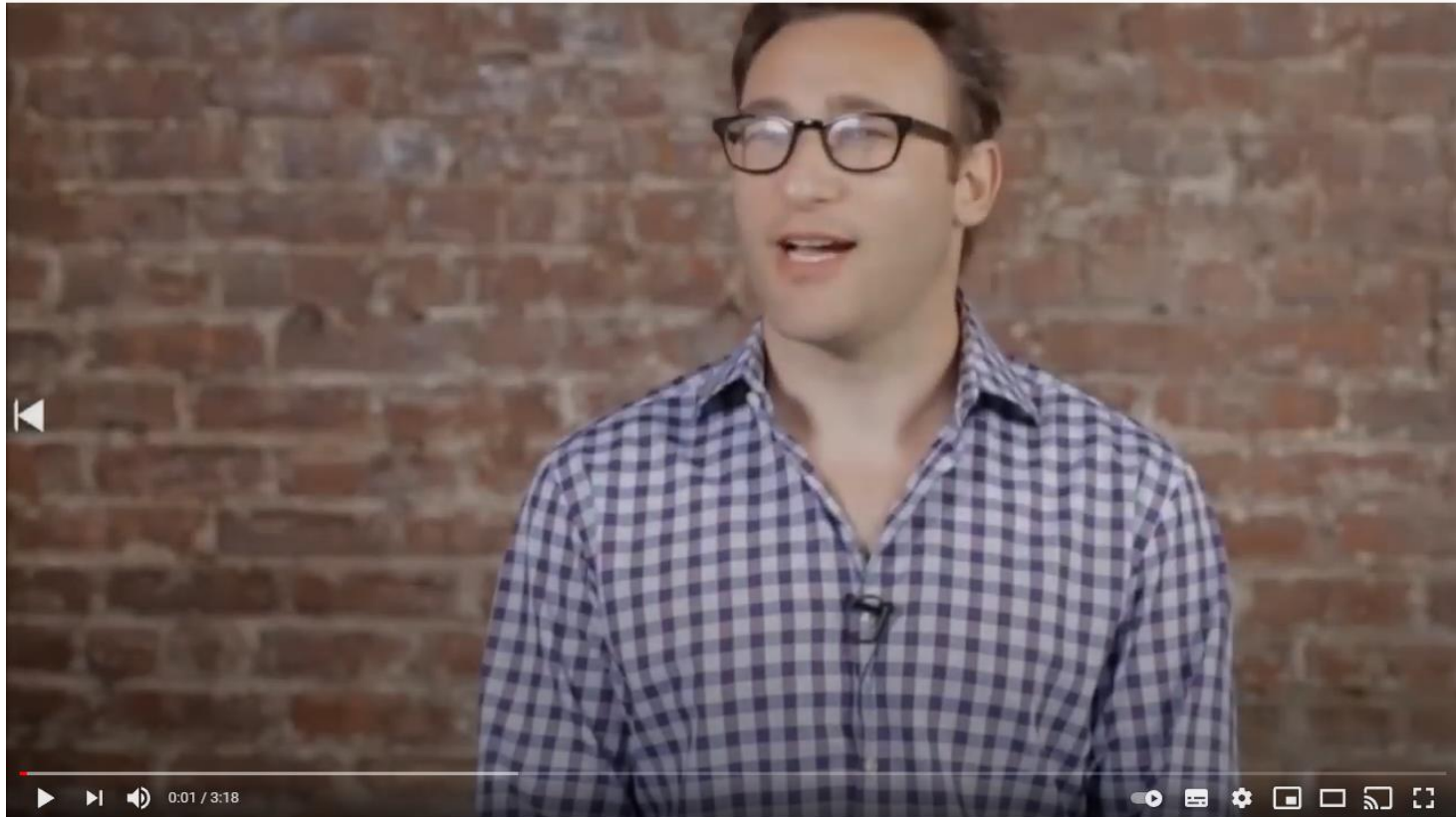
Videos about communication



Worst Presentation Ever

<https://www.youtube.com/watch?v=QyeDbF4AO5k>

Videos about communication

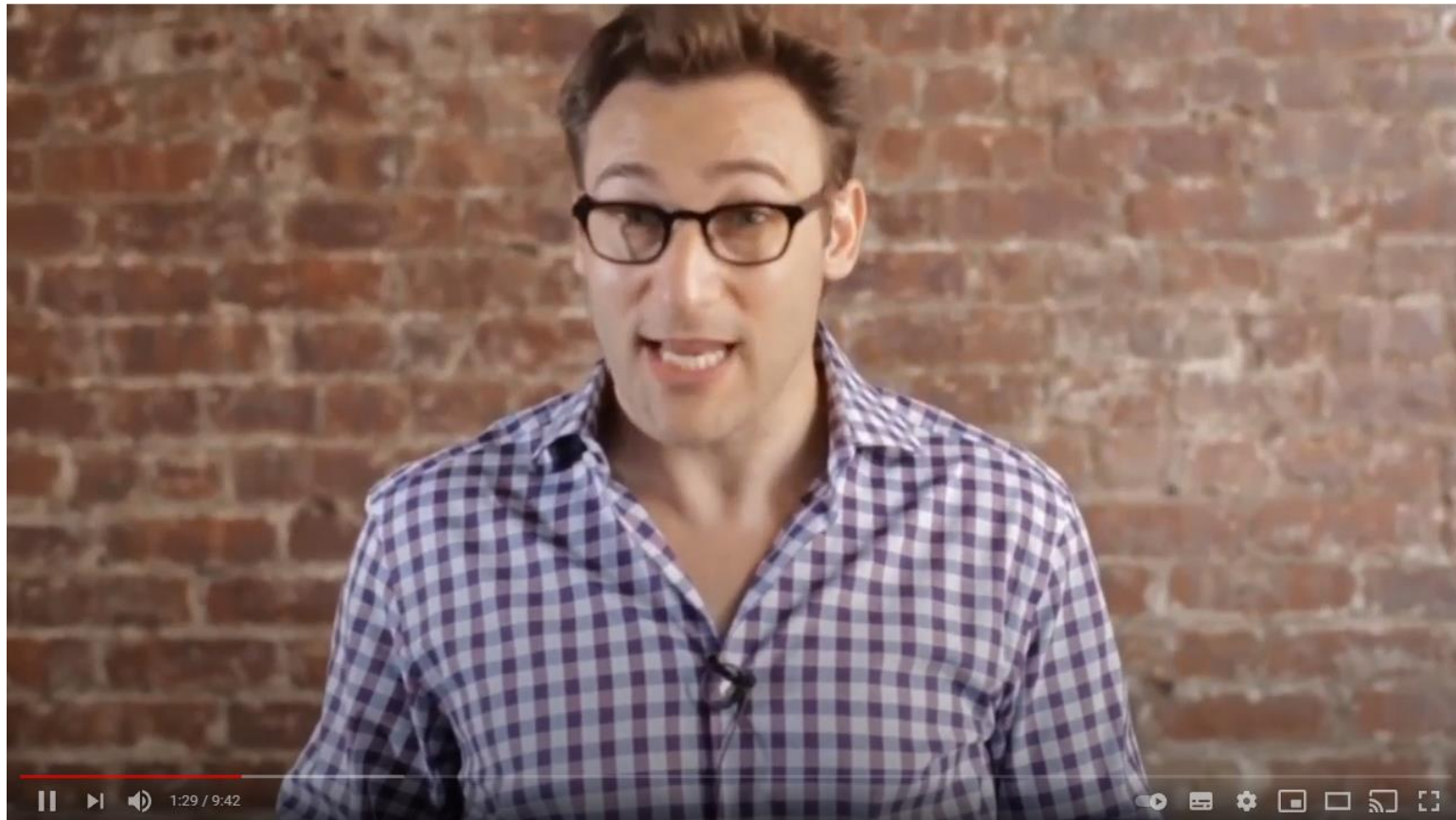


How to present properly - Simon Sinek(Part 1)

Simon Sinek How to Present Properly (Part 1)

<https://youtu.be/jOfThT4PXyw>

Videos about communication



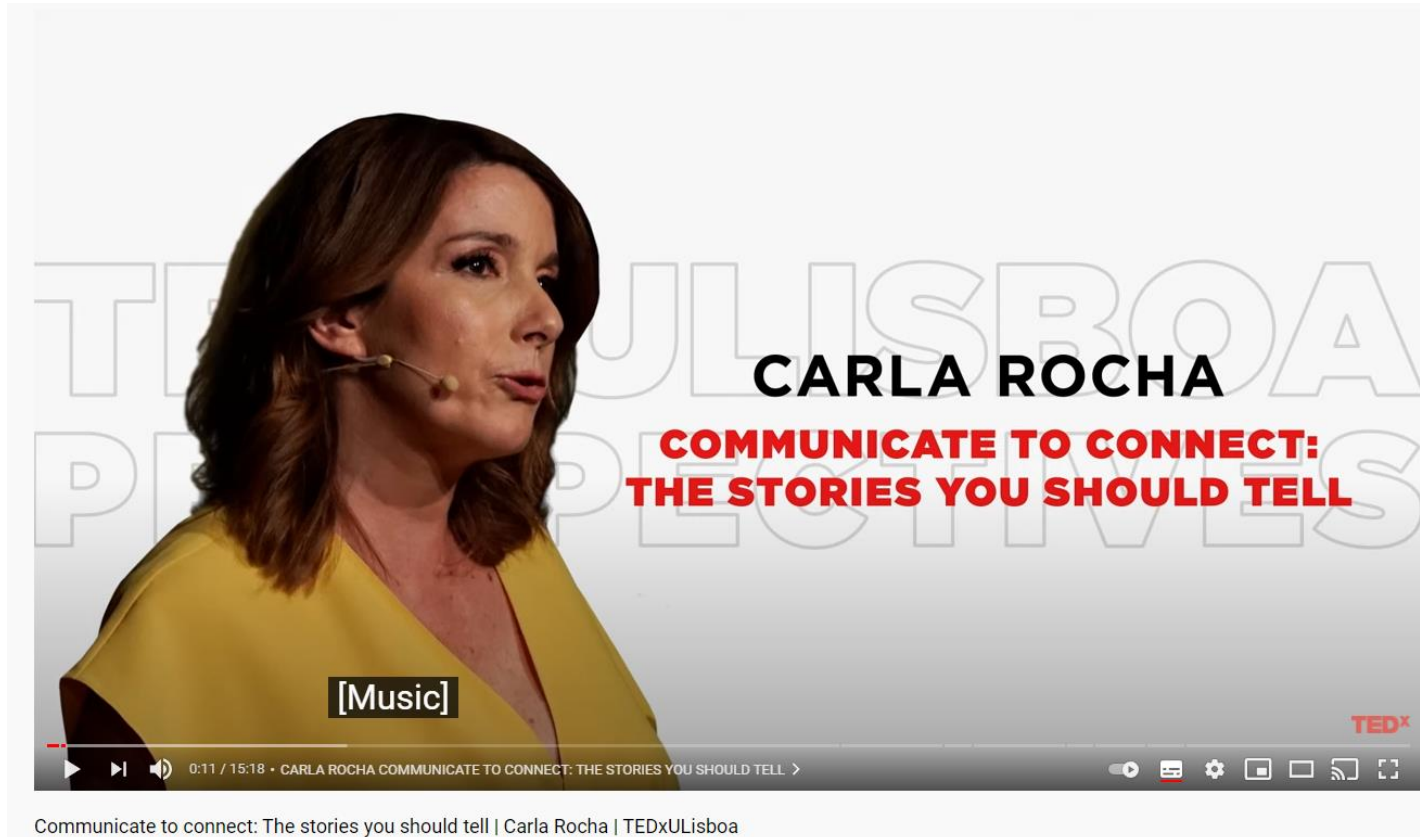
Simon Sinek How to Present Properly (Part 5)

<https://youtu.be/msvmLLAkOno>

Principles of Management

Thank you

Videos about communication



Carla Rocha TED Talk
<https://youtu.be/AyTDFKbJxRw>

Videos about communication



Simon Sinek - How to present properly(Part 2)

Simon Sinek How to Present Properly (Part 2)

<https://youtu.be/zr10lAnchuk>

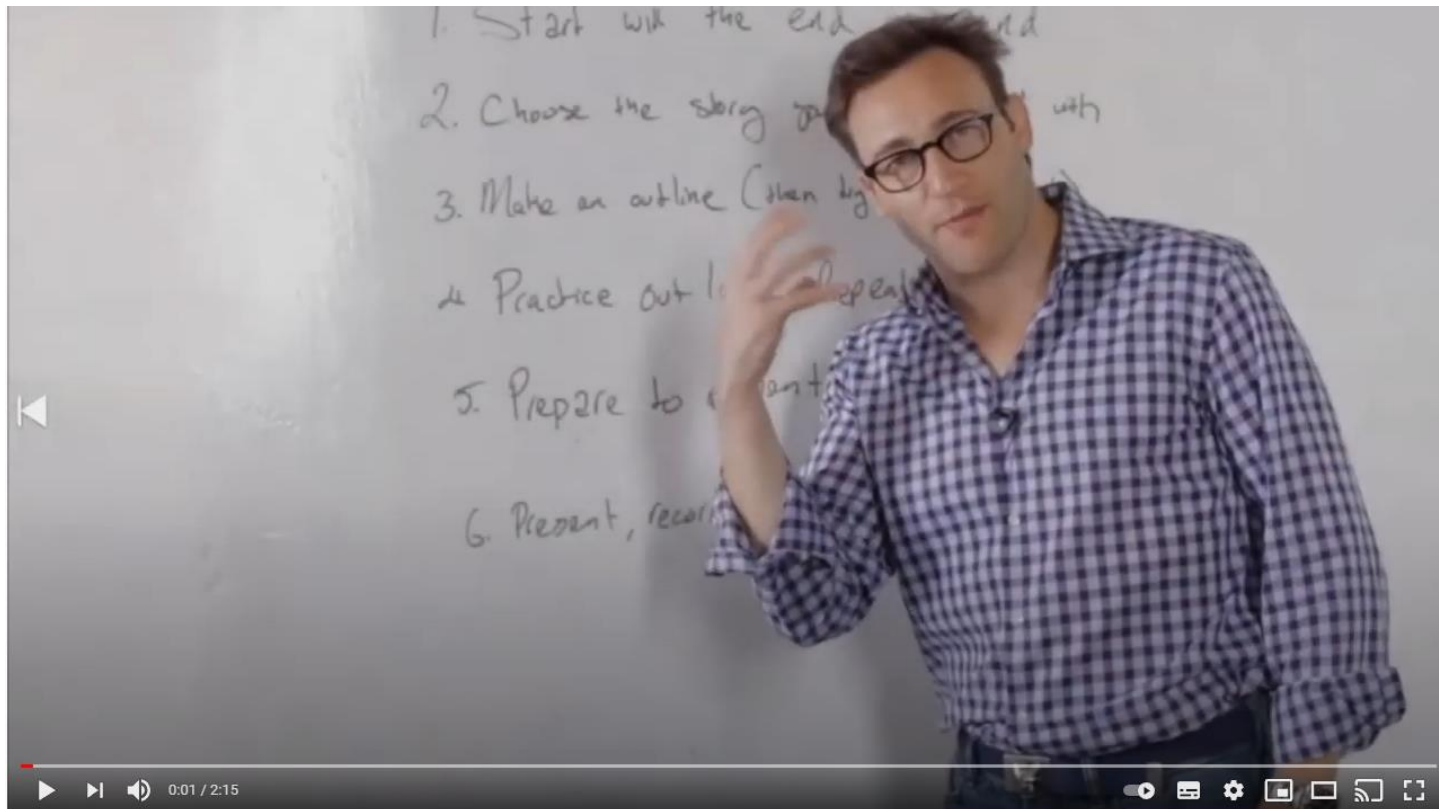
Videos about communication



Simon Sinek - How to present properly(Part 3)

Simon Sinek How to Present Properly (Part 3)
<https://www.youtube.com/watch?v=JQHTiFLabew>

Videos about communication



Simon Sinek - How to present properly(Part 4)

Simon Sinek How to Present Properly (Part 4)

<https://youtu.be/n7dkXvIFDTM>