

MSOD Reading Notes

Kate Pavlina, Chi Prime

611 : Texts - Required

Organization Development and Change (Cummings and Worley) - need to transcribe notes

Chapter 1

Chapter 2

Chapter 3

Organization Theory and Design (Daft) - need to transcribe notes

Chapter 1

Chapter 2

Chapter 3

Chapter 4

Age of Heretics (Kleiner) - need to transcribe notes

612 : Articles - Required

Contemplating Mindfulness at Work an Integrative Review (Good et al) - Need to Transcribe Notes

How the Mind-Brain Revolution Supports the Evolution of OD Practice. OD in Practice (Egan, Chesley and Lahl)

Bridging the Complexity Gap: Leadership in a VUCA World (Egan and Lahl)

Sustainability Leadership: Co-creating a Sustainable Future (Ferdig)

612: Texts - Required

Your Brain at Work (Rock) - notes taken in notebook

Helping (Schein) - notes taken in notebook

Mindsight (Siegel) - notes taken in notebook

The Three Marriages (Whyte) - notes taken in notebook

613 : Articles - Required

What Google Learned from The Quest to Build the Perfect Team (Duhigg)

Facilitative Process Interventions (Schein)

613: Texts - Required

Paradoxes

Chapter 2 - posted separately for group

Chapter 5 - posted separately for group

Organization Development and Change (Cummings and Worley)

Chapter 10

Groups in Context

[Chapter 3 \(50-73\)](#)

[Chapter 6](#)

[614: Articles - Required](#)

[How do you motivate employees? \(Hertzberg\)](#)

[The Discipline of Teams \(Katzenbach and Smith\)](#)

[614: Texts - Required](#)

[Groups in Context \(Gillette and McCollom\)](#)

[Chapter 1](#)

[Chapter 2](#)

[Chapter 7](#)

[Chapter 9](#)

[Team Building \(Dyer and Dyer\)](#)

[The Sustaining Power of Liberating Structures \(Lipmanowicz and McCandless\)](#)

[Difficult Conversations \(Stone\)](#)

[Organization Theory and Design \(Daft\)](#)

[Chapter 1 \(22 - 26\)](#)

[Images of Organization \(Morgan\)](#)

611 : Texts - Required

Organization Development and Change (Cummings and Worley) - need to transcribe notes

Chapter 1

Chapter 2

Chapter 3

Organization Theory and Design (Daft) - need to transcribe notes

Chapter 1

Chapter 2

Chapter 3

Chapter 4

Age of Heretics (Kleiner) - need to transcribe notes

612 : Articles - Required

Contemplating Mindfulness at Work an Integrative Review (Good et al) - Need to Transcribe Notes

How the Mind-Brain Revolution Supports the Evolution of OD Practice. OD in Practice (Egan, Chesley and Lahl)

- IPNB → used in decision making, problem solving, emotional regulation, collaborating with and influencing others, facilitating change
- Cognitive Neuroscience
 - understanding others
 - understanding self
 - controlling oneself
 - process that occur at the interface of self and others
 - nature of automatic vs. controlled processes
- Triangle of Wellbeing
 - Mind
 - personal subjective experience
 - Awareness
 - regulatory function that is an emergent
 - self organizing process of the extended NS and relationships
 - Brain
 - Relationships
- 9 Types of Integration
 - Consciousness - experience of knowing and awareness of known / creates choice and change
 - Bilateral - Left and Right brain processing / value both logic and emotions
 - Vertical - awareness of input from body, brainstem and limbic regions / reflective awareness / process strong emotional data without flipping one's lid
 - Memory - implicit memory is integrated to create a coherent whole / active authors of own life stories
 - Narrative - observe past and weave into now and future / understand and promote new neural pathways
 - State - Inner committee / move beyond patterns by accepting and integrating parts of self
 - Interpersonal - becoming part of a we while retaining identity / attuned relationships
 - Temporal - longing for certainty, permanence and immortality / live with comfort in the face of uncertainty
 - Transpirational - interconnected whole without losing a sense of personal identity / we are part of a larger whole

- We need a "just right" amount of arousal to have positive executive functioning; We're wired for connection

Bridging the Complexity Gap: Leadership in a VUCA World (Egan and Lahl)

- VUCA: volatile, uncertain, complex, ambiguous:
- Challenges: globalization, information technology, economic and political instability, climate change, interconnection, interdependence
- 10% have the complexity mindset / leadership capability, but neuroplasticity makes it possible to develop
- Dynamic Attention
 - no continuous partial attention
 - narrow vs. wide aperture
 - create space and capability for focus
- SPINE (whole person integrated capacity)
 - Spiritual - sense of meaning, purpose and community
 - Physical - maintain well-being and energy, use body signals
 - Intellectual - comfortable with ambiguity and complexity
 - iNtuitive - see patterns in unrelated data, source of creativity and insight
 - Emotion - value emotion as valuable info, regulate and attune to others
- Strategic Clarity - Wise self, narrative awareness and inner committee
- Authentic Collaboration - viewing the org as a community capitalizes on our natural desire for connection to others (psych safety, interdependence)

Sustainability Leadership: Co-creating a Sustainable Future (Ferdig)

- Areas of thought: long-term viability of natural systems and services they provide for humans, unacceptable social conditions, local and global economies and the potential they hold to create wealth and prosperity for all inhabitants of earth
- Challenge: who counts as a leader, the roles of a leaders and where a leader stands in relation to those her or she leads
- Leaders manage, inspire, unleash, influence and direct the behavior of others toward an outcome presumes to be the most beneficial for all those involved / inspire a shared vision, build consensus, provide direction and foster changes in beliefs and actions among followers needed to achieve the goals of the organization or community
- New School: anyone can become a leader, lead with not over others, leader operates within holistic interconnections that exist between people and natural systems
- Triple Bottom Line
 - Environmental
 - social consciousness and service
 - responsible business and economic development

- Sustainability leadership
 - rather than providing all the answers, they create opportunities for people to come together and generate their own answers
 - Opportunities to explore, learn and devise a realistic course of action to address sustainability challenges / make the notion of sustainability personally relevant
 - Everything is relevant to everything else, and we live in a dynamic and ever-changing universe of interconnected systems

Entering the Fundamental State of Leadership (Quinn)

- Leaders are at their best when they base their actions on their deepest values and instincts → This can be done not only during a crisis but at anytime – with the right frame of mind
- Leadership Development Programmes
 - Based on the assumption that by studying the behaviour of successful leaders, people can be taught to emulate them „
 - But successful leaders do not copy anyone, but depend on their own fundamental values and capabilities – operating in a frame of mind that is true to them yet paradoxically, not their normal state of being „
 - This is known as the fundamental state of leadership
- The Fundamental State of Leadership „
 - How we confront a crisis and move forward „
 - When faced with a significant life challenge – a promotion, a professional failure, a serious illness, a divorce, the death of a loved one – making decisions not to meet others' expectations, but to satisfy what you believe is fundamentally right „
 - Being at your best and raising to the task, when tested
- Can we enter the fundamental state of leadership without crisis? „
 - Yes, can be done at any time „
 - By honestly answering just four questions „
 - Entering the state makes us more capable, and also elevate the performance of our co-workers „
 - We can deliberately choose to enter the fundamental state without having to wait for a crisis to occur
- The Normal State „
 - A healthy and necessary condition „
 - Not conducive to coping with crisis „
 - Remaining in your comfort zone „
 - Allowing external forces to determine your behaviour and decisions „
 - Losing moral influence „
 - Relying on rational argument and authority to bring about change „
 - Complying with leaders out of fear „
 - Unimaginative and incremental reproducing what exists
- Moving into the Fundamental State „
- A shift along four dimensions
 - 1. Moving from being comfort centered to be results centered
 - 2. Moving from being externally directed to being more internally directed
 - 3. Moving from being self-focused to being more focused on others
 - 4. Moving from being internally closed to being externally open
- Normal versus Fundamental State

- Internally Closed: I block out external stimuli in order to stay on task and avoid risk
- Externally Open

- Self Focused: I placed my interests above those of others and the group
- Others Focused: I put the collective good first the group Self-focused
Other-focused

- Comfort Centered: I stick with what I know
- Results Centered: I venture beyond familiar territory to pursue ambitious new outcomes

- Externally Directed: I comply with others' wishes in an effort to keep the peace
- Internally Directed: I behave according to my values

- 1. From comfort centered to results centered „
 - Comfort centered is safe but leads to a sense of languishing and meaninglessness
 - To move from the normal reactive state to a more generative condition, we need to ask a single question – “What result do I want to create?” „
 - Pushes us from the path of least resistance „
 - Lead from problem solving to purpose finding
- 2. From externally directed to internally directed „
 - Stop complying with others' expectations and conforming to the current culture „
 - Clarifying core values and increasing integrity, confidence and authenticity „
 - Behaving differently as we become more confident and authentic „
 - Being true to our values and willing to confront any conflict that rises
- 3. From self-focused to focus on others „ Self-focus over time leads to isolation „
 - Other focus – by putting the needs of the organization above our own – we are rewarded with their trust and respect „
 - Empathy increases, cohesion follows and tighter and sensitive bonds are formed „
 - An enriched sense of community is created „
 - Conflicts which take place in high-performing organizations can be transcended
- 4. From internally closed to externally open „
 - When we are internally closed, we pay attention to signals that we know to be relevant; if incremental adjustments are required we respond, but if dramatic changes are called for, we become defensive and are in a state of denial – a mode of self-protection and selfdeception „
 - If we are externally open, we can do things that we are not comfortable doing; we are more aware, more adaptive, credible and unique
- Entering the Fundamental State of Leadership „
 - The four qualities – being results centered, internally directed, other focused and externally open - allows us to enter the fundamental state „
 - We become generative and attractive „
 - Without these we can be highly influential, but our influence is somewhat limited „
 - We attract others to perform better and even if we are no longer present a high-performance state is sustained
- Are You in the Fundamental State of Leadership? A Check List „

- Think of a time when you were at your best as a leader – when you reached the fundamental state of leadership – and use the check list to identify the qualities you displayed „
- Then check off the items that describes your behaviour today „
- Compare the past and present „
- If there are significant changes, what changes do you need to take to get back to the fundamental state?
- Am I results centered? „
 - Most of the time we are comfort centered – doing what we know how to do „
 - Being comfort centered is hypocritical, self-deceptive, and normal „ In pursuing new outcomes, if it means leaving our comfort zones, we resist and find ways to avoid changing „
 - Being results centered is to be proactive, intentional, optimistic, invested and persistent „
 - We become more energized and our impact on others become more energizing „
 - It means leaving our comfort zone – behaving in new ways and generating new outcomes
- Am I other focused?
 - „ Most of the time we put our own needs ahead of the whole „
 - It is healthy and it's a survival mechanism „
 - But if our self-interest controls our relationships, others trust us less; they no longer derive energy from their relationships with us and over time move away „
 - Being other focused means commitment to the collective good in relationships, groups or organizations, even at your own personal expenses „
 - When a leader put the good of the organization first, people notice and the leader gains respect and trust „
 - Group members in turn are more likely to put the collective good first, and tasks that seems impossible become doable
- Am I externally open? „
 - If we are closed to external stimuli, we are focused on our task, but we are ignoring signals that suggest the need for change „
 - Denying these signals are self-protective while at the same time self-deceptive „
 - Being externally focused, we shift from controlling our environment to learning from it and recognizing the need for change „
 - We depart from established routines and we genuinely seek honest feedback „
 - A cycle of learning and employment is created and we see things people normally cannot see and formulate transformational strategies
- By challenging ourselves – a painful process – and entering the fundamental state of leadership, we can make a positive impact on our own lives and on the people around us

Managing Ambiguity: The Emerging Impact of Mindfulness for Change Leaders (Chesley and Wylson)

Mindfulness practices can help reduce stress resulting from ambiguity during transformational organization change - on the leader and IC level

612: Texts - Required

Your Brain at Work (Rock) - notes taken in notebook

Helping (Schein) - notes taken in notebook

Mindsight (Siegel) - notes taken in notebook

The Three Marriages (Whyte) - notes taken in notebook

613 : Articles - Required

What Google Learned from The Quest to Build the Perfect Team (Duhigg)

Psychological safety is key for team success, specifically the ability to communicate openly and equally AND to care about one another empathetically; Team success > Personal success; Sharing personal info can help

Facilitative Process Interventions (Schein)

- Pre-decision
 - formulate problem statement
 - generate ideas for the solution
 - evaluate implication / outcome of each solution
- Decision
 - lack of group input and whether that implies agreement or disagreement
 - Types of Decision Making
 - authority rule
 - majority rule
 - minority rule
 - Consensus
 - Unanimity

- Post-decision
 - action planning
 - action steps
 - consequences of each step
 - potential redefinition of problem
- Tip for the practitioner: Don't get seduced by the problem, listen and stay concerned with HOW they are working on the problem
- Task Structure
 - mission/primary task
 - specific goals and strategies
 - means to use to accomplish the goal
 - measuring and monitoring systems
 - systems for fixing the problem and getting back on course

613: Texts - Required

Paradoxes

Chapter 2 - posted separately for group

Chapter 5 - posted separately for group

Organization Development and Change (Cummings and Worley)

Chapter 10

1. Motivating Change
 - a. Creating Readiness
 - i. Sensitize organization to pressures for change
 - ii. reveal discrepancies between current and desired states
 - iii. convey credible positive outcomes
 - b. Overcome resistance
 - i. Use empathy and support
 - ii. Communicate
 - iii. involve and allow stakeholders to participate
2. Create a vision
 - a. Emotionally appealing, bold, alluring, achievable but daring
 - b. Get stakeholders involved in vision setting
 - c. Describe the future (mission, valued outcomes, valued features)
3. Energize Commitment
 - a. A slogan or metaphor can help tie people to the cause emotionally but use words wisely (connotations)!

4. Develop political support
 - a. Groups can be afraid of shifting power balance, individuals can be afraid of their ability to cope in the new state
 - i. assess change agent power
 - ii. identify key stakeholders
 - iii. influence stakeholders
 1. Knowledge - play it straight
 2. Others' Support - use social networks
 3. Personality - going around the formal system
5. 4. Manage the transition
 - a. Activity Planning
 - i. Establish midpoint goals
 - ii. Create benchmarks for change
 - iii. Remain adaptable to feedback
 - iv. Commitment Planning
 - v. Intermediate Management Structure
6. Sustaining Momentum
 - a. Providing resources
 - i. Training
 - ii. Consultation
 - iii. data collection
 - iv. Feedback
 - v. special meetings
 - vi. Budget
 - vii. resources to offset declined performance
 - b. Build an emotional support system for change agents
 - c. Develop new competencies and skills
 - i. KSAs
 - ii. Traditional training programs
 - iii. On the job counseling
 - iv. Experiential simulations
 - v. Technical AND social skills
 - d. Reinforcement
 - i. formal rewards
 - ii. Recognition
 - iii. Encouragement + praise - make them feel good about themselves and their behaviors

Groups in Context

Chapter 3 (50-73)

- The group as a whole: a systemic socioanalytic perspective on interpersonal and group relations
- Org processes refer to actual working activities, form and informal relationships, psychosocial phenomena that occur among groups in orgs

- Groups (an orgs) are living, open systems that exchange energy, material and info with their environment
- Definition of a Group: A collection of individuals who
 - Have interdependent relations with each other
 - Perceive themselves as a group (members vs. non-members)
 - Others perceive them as a group
 - Have differentiated roles within the group as a function of expectations
 - As a group members acting alone or in concert have interdependent relations with other groups
- 5 levels of organizational processes
 - Intrapersonal - within
 - Interpersonal - between
 - Communication patterns
 - Info flow
 - Level of conflict and trust
 - Relating style of co-actors
 - Relate to peers
 - Listening
 - Establish meaningful and viable alliances
 - Group Level - group as a whole
 - Basics
 - Groups are paradoxically more and less than the sum total of the individual co-actors and their intrapsychic dynamics
 - Interactions = a gestalt → Elan Vital of the group (life force)
 - Groups mentality connects and bonds members by an unconscious tacit agreement
 - Group as mother
 - Stress of group life → lose problem-solving facilities, become emotionally segregated, blame others for failure → infantile regression
 - Tension generated by the unconscious fear of being engulfed and obliterated by the group (fused with) or person-in-isolation
 - Group represents the primal mother
 - World as self
 - Self as omnipotent
 - Omnipotence is reinforced by mother who continuously meets the neotate's needs → Good mother
 - As time passes, mother is less attentive → Bad mother
 - Infant has to reconcile good and bad by projecting those feelings onto outside objects (i.e. good parents, bad strangers; good mommy, bad daddy)
 - Autistic pre ambivalent state
 - Splitting - individuals disown parts of their self that are undesirable

- Projective Identification - individuals unconsciously identify with an object (person, place, event, attitude) by externalizing (projecting) split (disowned) parts of themselves
 - Example is overly dependent soldiers on their leader (p 58-60)
- Within the Group
 - Projective Identification
 - Basics
 - Altering the perception of an object and therefore altering the perception of the self
 - Feeling of relating to others because one has attributed qualities of their own onto them
 - Distortion of reality
 - Finding a proxy in the world to serve as a repository for one's own wishes
 - Motif in Groups
 - Unconscious collisions through valence bonds - tendency to respond to certain types of projections and to adopt special roles
 - Valency - the propensity to collude, introject and respond to projections by others - is dependent upon:
 - Individuals object relations (how they relate to self and world)
 - Individuals identity based on demographic characteristics
 - Stereotype attributions (projections, symbolizations, imagoes) (that contribute to group norms)
 - Role Differentiation
 - Vehicle by which group members manage their conflicts, ambivalence and tasks
 - Isolate conflicts - adaptive and defensive in nature
 - Essentially a way that individuals cope with the group situation
 - Manifestation of the groups changing pattern of projective identification
 - Scapegoating
 - Scapegoat represented sins of the tribes that must be separated from themselves and sent into the wilderness
 - Atonement and purification of the group through the sacrifice of the scapegoat

- Groups search and destroy mission not only purifies them, but brings members together in a common goal
- Filling up of a person with the groups exitey, isolate these feelings in the person as if they're the only ones doing the thing or feeling crazy, exorcise the person from the group and then deny any responsibility for making the person the scapegoat
- Subtle and dangerous
- Intergroup - between groups or subgroups
- Inter organization - between org and environment

Chapter 6

- Standard models state that groups change over time - i.e. forming, storming, norming, performing, adjourning
- Questions for these models: how are stages defined? How does movement occur from one stage to another? What forces drive development?
- Universal principles of individual development
 - Can something like this apply to groups?
 - People move through predictable series of changes over time, the patterns of change hold across individuals but contain variations determined by the unique circumstances of tlife
- **Criteria for Individual Development vs. Group**
 - Individuals pass through a common sequences of stages as the grow older
 - Invariant sequence vs. oscillating continuously among issues
 - Oscillating among basic assumptions and work modes or the resolution of conflicting wishes and fears
 - Work of each stage builds upon the work of the previous
 - Quality of work in each stage depends on how well or poorly the work of the previous stage(s) was done
 - Non hierarchical (no better or harder) vs. displacement of lower stages by higher stages
 - Better performance, more mature relationships, overcoming obstacles to valid communication, boundary awareness → better though?
 - States have distinct features or structures
 - Fundamental agreement that there is an inability to discern clean boundaries between stages, significant variation in length
 - Integration process, in which the works of prior stages is folded into the current stage
 - Each stage is distinct but contains elements of the other → Paradox again!

- Stages overlap and contain elements of each other
- Change from one stage to another is episodic, not continuous
 - None say development is smooth and continuous change process
 - spurts with periods of stability
 - Stuckness alternating with periods of dramatic transformation
- Development represents an individual's process of individualization, clarifying boundaries with the external environment
 - Changes in a person's relationship to themselves and the external world
 - Increasing sense of autonomy and the ability to overcome anxiety increased interdependence among members, gradual encroachment of the light on shadow
 - Progressively clearer boundaries between himself and the world and has a firmer grasp on reality
- Development is driven by the interaction of biological, psychological and social forces
- **Categories of Unified Models**
 - Performance Models - groups resolve process issues as preparation to competent task performance
 - Mills: encounter, testing boundaries and modeling roles, negotiating norms, production, separation
 - Tuckman + Jensen: Forming, Storming, Norming, Performing, Adjourning
 - Lacoursiere: Orientation, dissatisfaction, resolution, production, termination
 - Emotional Climate Models - contain no stage of optimal performance, but rather describe a procession of emotional concerns in the group
 - Schutz: Inclusion, control, affection, affection-control-inclusion
 - Dunphy: early period (1 maintain external norms, 2, 3 warfare), later period (4 transition, 5,6, concern for affection)
 - Kaplan: Dependency, power, intimacy
 - Bennis & Shepard: Phase 1: Dependence (1 dependence-flight, 2 interdependence / flight, 3 resolution-catharsis), Phase 2: Interdependence (1 enchantment-flight, 2 disenchantment-flight, 3 consensual validation)
 - Revolt Models - groups proceed predictably toward a rebellion against the leaders, some end in guilt others end in utopia → moving to competition and intimacy and ending with a termination phase
 - Slater - Leader as God, leader as fallible, revolt, post-revolt guilt
 - Hartman and Gibbard - Uncertainty-revolution, group fusion - utopia, competition-intimacy, termination
- Question of validity - are the settings of groups and their environment just too different to come up with a common model? Yes. We cannot adequately control to test and compare.
- **Dynamic Contingency Model**

- 3 Factors to consider: biological, psychological, social → To complex to generalize as they interrelate differently in different settings
- Factors influencing development
 - Environment
 - Embeddedness in larger institutional setting
 - Authority relation
 - Task
 - Internal Relations
 - Composition
 - Size
 - Skills
 - Personality
 - Subgroup relations
 - Leadership dynamics
 - Temporal Boundaries
 - Lifespan of the group is finite
 - Members' experience of the end of the group
 - Seasonal Cycles
 - Historical Events
- Why helpful? Managers can be aware of complex factors of development and be primed to more intentionally think about how and when to intervene

614: Articles - Required

How do you motivate employees? (Hertzberg)

The Discipline of Teams (Katzenbach and Smith)

- Why is the concept of team important?
 - Managers can make better decisions about teams when they know what one actually is
 - Not all groups are teams - there are tons of amorphous groups that we call teams because we think the label is motivating and energizing
- Team vs. Working Group
 - Definition of a team: a small number of people with complementary skills who are committed to a common purpose, set of performance goals and approach for which they hold themselves mutually accountable
 - Team
 - Values of a team encourage listening and responding constructively to views expressed by others, giving others the benefit of the doubt,

providing support and recognizing the interests and achievements of others

- Promote individual, group (collective work products) and org performance
- Discussion, debate and decision (more than info sharing and best-practice performance process / standards)
- The sum is more than the individual bests
- Working Group
 - Good working groups share information, perspectives and insights to make decisions and help each person do their job better, as well as to reinforce individual performance standards
 - Only take responsibility for their own work

Working Group	Team
> Strong, clearly focused leader	> Shared leadership roles
> Individual accountability	> Individual and mutual accountability
> The group's purpose is the same as the broader organizational mission	> Specific team purpose that the team itself delivers
> Individual work products	> Collective work products
> Runs efficient meetings	> Encourages open-ended discussion and active problem-solving meetings
> Measures its effectiveness indirectly by its influence on others (such as financial performance of the business)	> Measures performance directly by assessing collective work products
> Discusses, decides, and delegates	> Discusses, decides, and does real work together

- Creating Common Commitment
 - Purpose in which team members can believe in are usually related to winning, being first revolutionizing or being a team on the cutting edge of something
 - Ownership and commitment to team purpose is not incompatible with taking initial direction from the outside (except for in entrepreneurial situations), and

purpose is often shaped by demand or opportunity put in their path by higher management

- Management is responsible for creating the charter, rationale and performance challenge of the team, while leaving flexibility for the team to develop its own commitment around its own spin on that purpose, setting of specific goals, timing and approach
- Failed teams tend to not coalesce around a challenging aspiration
- From Purpose to Results
 - The next step is to translate purpose and any broad directives into specific performance goals, which are measurable, and define a set of work products that are different from individual objectives
 - Specificity of these goals facilitates clear communication and constructive conflict, and allow for moments of small achievement /wins, that build commitment and help when there are obstacles to overcome
 - Attainability of goals helps teams maintain their focus on getting results because they can have a mechanism to measure progress, know where they stand and level on team behavior
 - Goals also challenge teams to make a difference, which is motivating and energizing
- Qualities of a team
 - 2 - 25 members, typically
 - Larger teams are more likely to break into sub teams to avoid issues with interacting constructively or doing real work
 - Challenges of larger teams are working through individual, functional and hierarchical difference, finding space and time to meet, prevalence of crowd / herd behaviour and development of superficial "missions" that are well-meaning but cannot be translated into concrete objectives
 - Finding the right mix of skills is key, even more so than person abilities meshing, but also should not be overemphasized (teams are good vehicles for developing skills too!)
 - Technical or Functional Expertise
 - Problem Solving or Decision Making Skills: Identify problems and opportunities the team faces, evaluate options they have for moving forward and then making the necessary trade offs and decisions about how to process (can be learned on the job in a good team)
 - Interpersonal skills: effective communication, constructive conflict, risk taking, helpful criticism, objectivity, active listening, giving the benefit of the doubt and recognizing the interests and achievements of others
- Working as a Team
 - Every members does equivalent-ish amounts of real world work (including the leader), contributing in concrete ways to the teams work product
 - Teams will develop norms about how they work together: who will do particular jobs, how schedules will be set and adhered to, what skills need to be developed,

how continuing membership in the team is to be earned, and how the group will make and modify decisions

- Moving from the boss holds me accountable → **we hold ourselves accountable**
- At the core team accountability is about the sincere promises we make to ourselves and others, promises that underpin trust and commitment
- Teams enjoy a strong common purpose and approach inevitably hold themselves responsible, both as individuals and as a team, for the team's performance → energizing and motivating
- Types of teams
 - Teams that recommend things
 - Task forces, project groups, audit, quality or safety groups asked to study and solve particular problems
 - Usually have predetermined completion dates
 - Important for this type of team to get off to a fast and constructive start and deal with the ultimate handoff to get the recommendations implemented effectively
 - Clarity of the charter and composition of membership are important, as is making clear **why** their contributions are important
 - These teams need to have a clear expectations of who should participate and the time commitment required
 - Management's role is to open doors and deal with political obstacles
 - Usually the problem with these teams is missing the handoff of their recommendation to the implementers
 - Its best to involve outside people as early as possible and often
 - At the minimum they should get a briefing on the task forces approach, purpose, and objectives at the beginning, as well as a regular opportunity to review progress
 - Teams that make or do things
 - At or near the front lines, including basic manufacturing, making, sales operations, development and other value adding functions
 - No set completion date because activities are ongoing - they should focus on company's critical delivery points to stay focused
 - Managers should focus on carefully constructing a performance focused set of management processes and building the necessary systems and process supports
 - Often there is a relentless focus on performance - managers can help by instituting pay schemes and training exercises, and making clear and compelling demands on the team then paying constant attention to progress
 - Teams that run things
 - Groups that become real teams seldom think of themselves as a team because they are so focused on performance results

- Many groups that run things can be more effective as groups rather than teams
- Key judgement is whether the sum of the individual bests will suffice for the performance challenge at hand or whether the group must deliver substantial incremental performance requiring real joint work products
- The price of faking the team approach is high: At best, members get diverted from their individual goals, costs outweigh benefits, and people resent the imposition on their time and priorities. At worst, serious animosities develop that undercut even the potential personal bests of the working-group
- Working groups are less risky
- These teams also can confuse the broad mission of the total org with that of their small group at the top
- Not all peer reports need to be a part of the team, goals don't need to be the same as the organization's goals, skills (rather than position) should determine their roles within the team, not everyone has to be on the team all the time, and the team leader must do real work
-

614: Texts - Required

Groups in Context (Gillette and McCollom)

Chapter 1

- Practice of Learning
 - Iterative moments of pulling together experience and theory, online and offline, creating the foundation for growth
 - On-line → Actively working with the group in the midst of its dynamics
 - Off-line → Not with the group, but within the context of the larger organization or off alone, not at work
 - Experience + Theory + Efforts to bring experience and theory together
 - Perspective is created by membership in the group **and** membership in larger organization, over the passage of time
 - Experience → Reflection → Abstract Conceptualization → Active Experimentation (Kolb)
 - Experience → Reflection → Experience.... (Schon)
- On-Line Time
 - Most involving and overwhelming time period
 - Ability to experience - to be in and open to the forces at work within the group - and step back and reflect - to step out, to generate a process of critical thinking

and judgements, the ability to manage these two states and judge how to balance the two

- Experience
 - Openness to feelings and thoughts, in the midst of the group situation, which is often chaotic, unstructured, uncertain and where members have no idea what's going on
 - Having the courage to trust and self-disclose
 - Intellectual energy to notice how and when signals are being sent my way and deal with them appropriately
 - In many settings, emotion vs. intellect one is favored over the other, and then we have to balance
 - Gather information, listen, soak up dynamics, but balance that with potential sensory overload and undermining of cognitive abilities
- Reflection
 - Step out of an experience and generate, through increased distance, a different perspective on that experience
 - Affirm the relevance of emotions and tie them, though intellectual efforts, to an understanding of the dynamic (partnership)
 - Framing - a technique of setting up an analysis, of setting out the criteria for evaluating what questions are important and which are tangential → helps avoid focuses on questions that don't make a difference
 - Helpful to use a generative metaphor (Schon)
- Judgement
 - Ability to manage the two states
 - Judgement has to be continuously made based on an assessment of which state is most likely to generate a deeper understanding at that precise moment
 - Think of it as a continuum of closeness (experience, emotions, gathering info) and distance (reflection, defendedness, challenging assumptions, framing) → Judgement is managing where you fall on the continuum, based on the context of and dynamics within the group
 - Also involves monitoring the pressures that drive you one way or the other
- Testing
 - In transaction, it's testing / sharing as an attempt to shape the situation but in conversation with it, and with a further openness to be shaped by the process
 - Moving toward anxiety, that is when seeing further confirmation or disconfirmation, it is better to move toward the disturbing phenomenon than away from it
- Transition: On-line to Off-line

- Influence of on-line time lingers and can impact what goes on outside of the group and how we learn
- “Carrying the group with them”
- Post-group ruminations rely on final framings set up in the group
- Group is carried into the very core of its members’ critical thinking
- Attending to the transition process:
 - Are there sudden shifts in mood or tone?
 - Are there stable elements?
 - What events stay particularly vivid in the memory?
 - What is it that the student finds themselves doing when seeking to leave the event?
 - How and in what ways does the student find their perspective shifting?
- Off-Line
 - Analysis - Dialogue with self about self, others and group
 - Requires rigorous testing and placing one’s own thoughts, feelings and behavior under scrutiny
 - Owning one’s behavior and thoughts, even when “bad” or undesirable
 - Transference and countertransference
 - Use logical process to generate findings and attempt to challenge those findings
 - Data for Analysis
 - Must be trustworthy, verifiable
 - Must be accessible to other scholars
 - Sound logic of inference in drawing conclusion
 - Willingness to reframe, retest, and reframe further, which may disconfirm original analysis (but not go so far as to have an unreasonable amount of self-doubt)
 - Empathy as a validity test: Gain an understanding of, not necessarily acceptance of, behaviors and a sense of insight into why it happened
 - Theory is simply the process of connecting together seemingly disparate events into a pattern that makes sense
 - Reconstructive learning:
 - The organization questions its premises, purposes, values. For individuals those are represented in one’s goals, principles, life styles, beliefs. It calls for the in-depth confrontation of old patterns and the development of new and different ones. Creating new goals, policies and norms instead of using simple modification of the old ones
- Transition: Off-Line to On-Line
 - Like carrying the group with us, we also carry the analysis with us
 - Paradox of retaining both humility and courage about the analysis. The need to recognize that full analysis is a reciprocal process, and the awareness that

different analysis frames will import different pressures for behavior back into the group

- Recognize the tentativeness of new analysis
- Willingness to be open for correction and criticism
- Hold greater uncertainty and ambiguity and still act
- Not understanding of events, but with events
- Analysis is not a passive exercise that is done and left in the past, it is an **interpretation that drives action**

Chapter 2

- Managers must - all while minding the powerful emotional and unconscious process that drive individual behavior in collective situations -
 - Set goals for the group
 - Define who should be on the task force
 - Contact members before the first meeting
 - Schedule regular group meetings
 - Define working procedures
 - Enforce intermediate deadlines
 - Communicate among the group
- Groups serve functions for its members psychologically and for the formal organization function(s)
- Main stress of joining a group is anxiety around what membership means
 - Permeability of group / boundaries - who is in / out, what stays in / goes out, what comes in / stays out, relationship of system to its external environment
 - Interaction of sub-groups
- Boundaries of a Group
 - Physical - member vs non member
 - Spatial - where do they sit, meet, own space?
 - Temporal - meeting times, duration of group, members' life spans, amount of time dedicated to non-task during meeting time, adherence to meeting times that are set
- Group formation = how a group sets psychological boundaries
- Individual Experience of Formation
 - Uncertainty + Anxiety
 - around what membership will look like, feel like and require
 - Bad leadership - scapegoating, pointing the finger
 - Perpetual conflict
 - Even lack of boundaries
 - When the new group forms it is boundaryless and during its first meeting members test expectations against what actually happens, and the boundaries and norms are therefore set

- Expectations based on previous personal experiences
 - Expectations set by the leader prior to first meeting
 - Emotional feelings toward the group and its formation
- Striking the balance between my identity and being part of the group
- Formation of the group
 - Norms: rules of behavior that govern a group: who can do what when?
 - Who listens to whom, whose ideas are accepted, who wields influence
 - Themes
 - Authority
 - Caretaking
 - Communication
 - Conflict
 - Intimacy
 - Security
 - Work
- Leadership in Groups
 - Emotional aspects of group formation are not in the leaders control
 - Main role in formation is to manage the inherent anxiety and strive toward the creation of a well-defined but not impermeable boundary
 - Balance group identity and functioning with that of external environment (i.e. is it the same or in contrast to the larger org)
 - Assert authority only when you lack formal authority - otherwise it's implicit usually, when you have seniority or formal authority
 - Build collaborative relationships with members - works to understand their concerns and communicates expectations for the group

Chapter 7

- Application Work Background
 - The opportunity to learn how knowledge of group dynamics is relevant to their own and others' behavior in organizational settings, and to the development of actions for the management of human behavior
 - Common trend of leaving application work for the end of the course is likely due to the instructors lack of or type of training around application work, including the influence of the Tavistock conference structure, that focuses on intrapersonal awareness and interpersonal dynamics
 - Tavistock and NTL don't focus much on group or systems level dynamics
 - American version of Tavistock has focused on unconscious group processes, especially in relation to authority relations
- Application Work Challenges
 - Moves the individual from the here and now focus to the transfer of learning to other settings, which is a complex undertaking
 - Individuals have contempt for learning about themselves

- Instructors may be self-conscious about their correctness, applicability and ability to have their student take back home something relevant
- Individuals often have a hard time relating study-group experience to the real-world, because study groups can lack a concrete task and make members feel like they lack a role in the group
- Study groups do, however, have a place in a large social system with the same properties as other organizations
- Most effective if integrated throughout the course, but that's not the common M.O.
 - Tavistock tradition likens it to an import-conversion-export process
 - Unless prior work has occurred to help group members see the connections between their course learnings and behavior in orgs, it's ineffective
- Essential Elements of Integrating Application Work
 - Overview
 - The instructor needs coherent theory of the structural properties of organization that encompasses and understanding of behavior at multiple levels
 - The connection between application and the experiential learning process must be made clear
 - Application must be addressed in a manner that accommodates the developmental stage of the experiential group
 - Org theory and human behavior
 - Dynamics occur at multiple levels
 - Organizations are open systems, composed of interdependent groups of two varieties; organizational groups defined by the institutions needs with regard to accomplishing its primary task and identity groups, defined by the historical, cultural and biological characteristics of its members. Roles can be formal and informal, but they are connected to and shaped by the group and intergroup relations of the organization
 - The principal management task is boundary management
 - Physical, spatial, temporal, psychological
 - Relationship between members, sub groups and environment
 - Understanding the organizational properties helps to form a foundation for the subsequent application work of a bridging nature
 - See the dynamics of the group as parallel phenomena, deriving from structural properties common to the learning organization and other environment
 - Experiential Learning Theory
 - Process of Experiential Learning (Kolb)
 - CE - Concrete Experience
 - Actual encounter

- Here and now
 - Learners develop subjective understandings around this event and make abstractions from it to a particular class of phenomena
- RO - Reflective Observation
 - Examining what has comprised the experience and developing a personal understanding of its meaning
- AC - Abstract Conceptualization
 - Making logical deductions and generalizations from the data
 - Theory building or acquisition
- AE - Active Experimentation
 - Process of applying theory (AC) to actual events in order to foster a greater understanding of them,, to solve problems or to implement change
- Identify similarities and differences from the experience and behavior in on-line group experience
- Influenced by the nature of interpretation and metaphors used by instructors /texts
- Group Dynamics
 - Phases
 - 1. Preoccupied with issues of inclusion in and orientation to the group
 - 2. Struggles with issues of power, status and control
 - Most diligent work done here, members make lots of assumptions about the external groups that individuals represent and confer status on them accordingly, mirror power tactics in other orgs
 - 3. Assuming healthy resolution of 2., expression of more varied and intimate feelings; group cohesion and identification are high, facilitating the here and now work of the task at hand
 - Most difficult time to do application work, because the group is open to feedback and committed to self-reflection and scrutiny
 - 4. Termination
 - Feelings of loss and anticipation of life after the group
 - Ambivalence and regression
 - Application studies may be pushed out
 - Denial of impending termination
 - Doubt about the impact of work

Chapter 9

- Teaching Experiential Learning

- Providing learners with a psychologically secure setting in which to observe their own and others' behavior as it occurs and to examine concepts and theories that provide understanding for the events that take place
- Favorable mix of experience and conceptualization and of safety and challenge about oneself and others
- Key Conditions (5)
 - Selecting Participants
 - Focuses on Here and Now Behavior in experiential session
 - Organizing conceptual material based on a developmental conception of groups
 - Evaluative the intellectual work of students
 - Managing the intergroup relationships embedded in the educational environment
- History
 - Link between theory and technique has not always existed
 - University vs. Cultural Island
 - Social Science → Theory, Data and Social Technology
 - Britain - theory preceded technique in development of experiential learning group as a social technology
 - US - place advances in social technology above theory
 - T Group is short for Human Relations Training Group
 - Started with explicitly stated desired by leaders in business and government to improve the skills people brought to dealing with others
 - Electric effects of feedback
 - NTL vs Tavistock
 - Setting
 - NTL = Cultural Island
 - T = Residential Conference
 - Evolution - both served for education not psychology, but
 - NTL = started with explicitly educational objectives and over time developed a lab style that bordered on psychotherapy (aka therapy for normals)
 - T = emerged from psychotherapeutic tradition, and never mixed explicit educational objectives in (learning about groups with the conscious aim at helping individuals to change)
 - Portrayal
 - NTL = Argyers
 - T = Rice
- Selecting Participants
 - Important to consider what people are chosen and how they are picked
 - Cultural Island - may not know each other coming in and rarely interact after (days to 2 week program)

- University - participate in the same community before, during and after the educational experience
- Goal is to detect casualty prone people and avoid including them
- Process
 - Volunteers should get an accurate account of the experience they are about to join and actively choose to join because they want the education offered
 - Cultural Island people tend to be those sent by bosses to repair an unwanted behavior
 - University people tend to sign up for reasons other than educational
 - Give account of course activities and requirements, encourage to ask questions, respond in writing to a contract
 - Agree to attend a;| group sessions - barring emergencies
 - Accept the goal of the course to combine experimental and intellectual learning
 - Confirms they understand the course is not a sub for psychotherapy
 - Written statement of purpose
 - Evasive or ambiguous prose is a red flag
 - Why do they want to join?
 - Do they perceive therapy and education as different?
 - Eliminate individuals at random, after stratifying by demographic is needed- protecting individuals from scapegoating or isolation
 - Notice of denial
 - May request a reason, most don't
 - Accept their feels of anger or hurt
 - Although there is a high confidence in capacity of learning contract data to predict who will fail, affirm that most predictions are fallible, but this is not a basis for reopening the discussion
 - Manage relationship between course and wider environment - preserve respect
- Here and Now Focus
 - Running the group
 - Open the first group session with "The purpose of the group is to provide members with an opportunity to learn from the experience of behavior as it occurs in the here and not. I will comment on what is happening in the room when I think it will help people learn"
 - Have a signal that the sesh is starting after the announcement in the initial sesh (i.e. tape recorder starts)
 - NTL = Interpersonal behavior and relatively conscious emotion → person and behavior explicitly called out and probed

- T = Unconscious assumptions, fantasies and communications as they appear in the group as a whole → dynamic of subgroups explored
- Scales
 - Argyris - quality of interpersonal relations among executives in day to day organizational events and to analyze the learning process in experiential groups
 - Alderfer - Openness vs Here and Now Scales → Here and Now Wins
 - 5. Conversation about present group members today
 - 4. Conversation about present group members at a previous meeting
 - 3. Conversation about others in the course or school
 - 2. Conversation about people outside the course or school
 - 1. None of the above - random
- Developmental Phases
 - Groups with well-defined beginnings and ends pass through predictable stages during their development and demise (not all agree, however)
 - Organizing course around framework of phases provides conference - topics, paper assignments, lectures and readings that have relevance and where the group has the intellectual understanding to benefit from them
 - Periods of transition contain elements of preceding and subsequent phases
 - Regressions occur, particularly in transitions
 - Defined by boundary or relationship that is being formed, primary emotion that tends to be evoked, wish and fear combination associated with what emotion, modes of coping with the wish-fear tensions that tend to emerge
 - Authority and influence dynamics are a key consideration, esp for faculty
 - Students love or revolt
 - Students reflect their viewpoints
 - Students discuss feelings around the staff
 - If not discussed, a due date can prompt this discussion
 - Therefore staff should grade and provide comments in a timeline manner
 - Emphasis on intimacy can be created by stating the looming termination of the group - members have:
 - Created committed relationships
 - Speaking about deeply personal information with risk
 - Felt gratified by the experience for some,
 - Felt frustrated by unmet expectations for others
 - Sadness about the end of the group
 - Sadness about missed opportunities for learning and growth by the group
 - Group termination shows up
 - End work in advance of termination
 - Work strenuously to the end
 - Slow down vital functions as the end nears

Phase	Relationship or Boundary Issue	Primary Emotion	Wishes	Fears	Modes of Resolution
Formation	Forming the psychological group, being in vs out	Anxiety, discomfort	To be in, to be autonomous	To be out, to be overwhelmed	Staying out selectively, partial inclusion, total immersion
Influence	Giving and receiving negative emotions	Anger, frustration	To express aggression, to be influential, to be dependent	To be hurt, to be hurt, to accept influence	Remaining quiet, competing, carving role or turf
Intimacy	Giving and receiving positive feelings	Tenderness, love, affection	To be close, to receive attention	To be vulnerable, to be unworthy of affection	Staying away, stepping close, slowing disclosing fully
Termination	Eliminating the group boundaries	Grief, sadness	To be harmonious, to be complete, to be free of group pressures	To be incomplete, to be splintered and fragmented	Fantasizing, slowing down, working through

Team Building (Dyer and Dyer)

The Sustaining Power of Liberating Structures (Lipmanowicz and McCandless)

Difficult Conversations (Stone)

Organization Theory and Design (Daft)

Chapter 1 (22 - 26)

- Efficiency < Effectiveness
- Historical Perspectives
 - scientific management - technical/skilled firms, administrative principles - functioning as a whole
 - bureaucratic organizations - impersonal, rational basis without social context or human needs
 - hawthorne studies - positive treatment of employees improved motivation and productivity)
 - Contingency - it depends! Almost all organizations now function in highly uncertain environmental
- Mintzbergs Org Parts
 - Technical Core
 - Technical Support
 - Admin Support
 - Management - middle and top)
- Mintzbergs Org Types
 - Entrepreneurial
 - Machine Bureaucracy
 - Professional Bureaucracy
 - Diversified Form
 - Adhocracy - rapidly changing environment, innovation, continual change, overlapping cross-functional teams)
- Learning organizations (horizontal > vertical structure, empowered roles > routine tasks, shared info > formal systems, collaborative > competitive strategy, adaptive > rigid culture)

Images of Organization (Morgan)

622 : Articles - Required

So How do you assess your Corporate Culture? (Shein)

- Managers are measurement oriented
- Surveys only unearth artifacts
- Why don't surveys work?
 - You don't know what to ask
 - What questions are important?
 - Typically only climate is measured - how do people feel and work together?
 - Asking about shared process is ineffective
 - Better to ask about broad topics, look for consensus and then dig deeper
 - People will read into the questions differently
 - What does an anonymous survey say about culture itself vs. open focus group
 - What employees complain about may in fact be unchangeable
 - What values are not being met AND how they would be met
- How to get at your own culture
 - Am I a unique personality or just an example of my culture?
 - Ask first, what groups and communities do I belong to?
 - By asking people to change culture, we're asking an entire group to change one of it's shared characteristics
- Deciphering your company's culture - a 4 hour exercise
 - Cultural assumptions are tacit and out of awareness
 - Define the business problem - something you'd like to solve, something that could work better or identify a new strategic intent
 - Review the concept of culture - artifacts, espoused values, shared tacit assumptions
 - Identify artifacts - what's it like to work here? - 1 hour
 - Dress code
 - Level of formality with leadership
 - Working hours
 - Meetings (how long, often, how facilitated)
 - Communications - how do you learn stuff?
 - Decisions - how are they made?
 - Jargon, uniform, identity symbols
 - Rites and rituals
 - Disagreements and conflict - how are they handled?

- Balance between work and family
- Identify values
- Compare values with artifacts
 - If X is a value, what artifacts support that?
 - Look for inconsistencies and conflicts
- Repeat the process with other groups - what tacit assumptions are present in those subgroups?
- Assess the shared assumptions
- Do you need an outside consultant?
 - The facilitator just needs to understand the concept and 3 levels of culture
 - The facilitator must be someone
 - who can create the setting, provide the model, and keep asking provocative questions to keep the self-study group moving forward until some important shared tacit assumptions of the culture brought to consciousness

622 : Books - Required

Corporate Culture Survival Guide (Shein)

- Chapter 1: Why Bother?
 - Confusion around culture and leadership derives from a failure to consider this interaction between them or failure to define what stage of an organization's life we are talking about
 - Imposing beliefs, values and assumptions
 - If an org succeeds, then its cultural elements will become shared and constitute the emerging culture of the org
 - What can outside leaders do with culture?
 - Destroy the existing culture
 - Fight the existing culture
 - Give into the existing culture
 - Evolve the culture - adapt to figure out how to get things done and then gradually impose new rules and behaviors that rest on different beliefs, values and assumptions
 - Subcultures
 - Subcultures differentiate themselves based on occupations, product lines, functions, geographies and echelons within the hierarchy
 - Leaders at every level must recognize that they have a role in creating, managing and evolving the subcultures in their parts of the organization

- “Unstructured collaborative climate that enabled designers to trigger each other’s creativity - group products” within a greater culture of individual success (10)
- “Communication failures result when orgs have different priorities, leading to a gradual drifting apart of the communication systems used” (12)
- “Different occupations reflect different cultures based on the education and training of the people in those occupations” (13)
- People hear the rhetoric that “we will take the best from both cultures”, but that is usually not possible because each subculture will continue to support its own way of doing things (12)
- To understand subcultures, you must examine the backgrounds of the people who make up the group that are at issue (13)
- Merger Options
 - Separation
 - Subsidiary companies retain their separate identities
 - Works when they’re not working cross-functionally or purposes and have limited financial linkages
 - Difficult in partnerships or joint ventures
 - Domination
 - One company openly acquired another
 - One culture is always dominant, but the reality is that this may not always be visible for some time, due to rhetoric
 - Blending
 - Often claimed to be the desirable outcome
 - What happens is usually more complex and questionable
 - Create a new, superimposed set of values and then tell them to the various cultural units
 - Benchmark its various systems and procedures against each other and against externally perceived best practiced and create and standardize new procedures
 - I.e. draw senior people alternatively from each org to preserve the public image of a merger
 - Most likely to occur when separate subcultures face a new common problem that can only be solved by collaboration
 - When they interact, they start to pay attention to one another, developing an understanding of their differences, and create new ways of working through and taking advantage of both culture
 - Conflict
 - One sees subcultures that oppose at least some elements of the corporate culture in every org
 - Powerplays or politics
 - Subcultures with different views that are in conflict with each other, not individual managers

- Culture at Stages of Growth
 - Young and Growing
 - Attempts to stabilize and proliferate the culture that it views as the basis of its success
 - Budding identities
 - Often under control of founders - culture is more or less a reflection of their beliefs
 - Midlife
 - Defined as an org that has had at least 2 generations of professional manag that may be increasingly dysers appointed by outside boards whose members are usually beholden to divers stockholders
 - Org evolves into multiple units based on functions, products, markets or geographies, which develop subcultures of its own
 - Challenges
 - Maintain aspects of culture that continue to be adaptive and relate to org's success
 - Integrate, blend or align various subcultures
 - Identify and change cultural elements that may be increasingly dysfunctional as external environmental conditions change
 - Mature
 - Corporate culture reflects all the parts of the org and many subcultures reflect functions, products, markets and geographies
 - Cultural or misalignment can create serious challenges for survival
 - Culture can become a constraint on strategy
 - Often culture change in older orgs demand time and amounts of change that are dramatic "turnarounds"
- Whenever a group has enough common experience, a culture begins to form
- Cultural elements determining strategy, goals and modes of operating
- Leaders have unique roles as culture creators, evolvers and managers
- Questions
 - What communities or groups are you a part of that influence your values and ways of doing things? (i.e. family, national, ethnic, educational background)
 - Review current formal and informal group affiliations - what values or norms matter to you?
 - Think about your place of work, it's history and traditions - how does this relate to your own values?
- Chapter 2: What is culture anyway?
 - Overview

- Artifacts - visible organizational structures and processes (hard to decipher)
 - What you see, hear and feel as you hang around
 - Architecture, decor, climate, based on how people behave toward one another
 - At the level of artifacts, culture is very clear and has an emotional impact
- Espoused Values - Strategies, goals, philosophies (espoused justifications)
 - Start asking questions about the things the org values
 - Why do they do what they do?
 - Find informants or insiders and ASK
 - Inconsistencies tell you that at a deeper level, something else is driving overt behavior
 - This deeper level may or may not be consistent with the values and principles that are espoused by the org
- Underlying, Tacit assumptions - unconscious, taken for granted beliefs, perceptions thoughts and feelings (ultimate source of values and action)
 - Essence of culture is jointly learned values and beliefs that work so well that they become taken for granted and non-negotiable
 - Throughout the history of the org, what were values, beliefs and assumptions of the founders and key leaders that made it successful?
- Defining culture: pattern of shared tacit assumptions that was learned by a group as it solved its problems of external adaptation and internal integration, that has worked well enough to be considered valid and, therefore to be taught to new members as the correct way to perceive, think and feel in relation to those problems (27)
 - Cultures cannot be “measured” and “quantified” through surveys and other techniques that only ask about behavior and espoused values (28)
 - There is no right or wrong culture, no better or worse culture, except in relation to what the org is trying to do and what the environment in which it is operating allows (28)
 - Labels make it easy to miss other important dimensions (p 29-31)
- The Bottom Line
 - Culture is deep - culture controls you more than you control it
 - Culture is broad - if you don't have a specific focus or reason for wanting to understand your organizational culture, you will find it boundless and frustrating
 - Culture is stable - the members of a group want to hold onto their cultural assumptions because culture provides meaning and makes life predictable

- Chapter 3: What are the elements and dimensions of organizational culture?
 - The popular view
 - How people relate to each other and do their jobs - the way we do things around here
 - Often confused with climate - how the org feels, what employee morale is, how well people are getting along
 - Strong temptation to look for broad categories
 - Cultural assumptions involve not only the internal workings of the organization, but more important, how the organization views itself in relation to its various environments
 - External Survival Issues
 - Mission, strategy, goals
 - Means: structure, systems, processes
 - Measurement: error-detection and correction systems
 - Internal Integration Issues
 - Common language and concepts
 -

Flawless Consulting: A Guide to Getting Your Expertise Used (Block)

- Chapter 1: A Consultant by any other name...
 - Overview
 - traditional consultant has tended to act solely as an agent of management: assuming the manager's role in either performing highly technical activities that a manager cannot do performing distasteful and boring activities that a manager does not want to do.
 - When you don't have direct control over people yet want them to listen to you and heed your advice- you are to-face with the consultant's dilemma
 - consultants (wanting to influence but lacking authority control).
 - managers (having direct control)
 - Definitions and Distinctions
 - k manager is someone has direct responsibility over the action.
 - recipients of all this advice are called clients
 - clients for the services provided by support people called line managers.
 - When you act on behalf of or in the place of the manager/ you are acting as a surrogate manages
 - change in the line organization of a structural policy, or procedural nature
 - one or many people in the line org have learned something new

- consultation describes any action you take with a system of which you are not a part
- Every time you give advice to someone who is in the position to make the choice you are consulting.
- technical interpersonal and consulting skills
 - Technical Skills → expertise about the question
 - Interpersonal Skills → some ability to put ideas into words to listen to give support, disagree reasonably, to basically maintain a relationship.
 - Consulting skills → five phases. The steps in each phase are sequential; if you skip one or assume it has been taken care of you are headed for
- Consulting Skills Preview
 - Phase 1: Entry and Contracting
 - setting up the first meeting as well as exploring the problem, whether the consultant is fit to work on this issue, what client's expectations are, what the and how started.
 - Phase 2: Discovery and Drogue
 - sense of both the problem and the strengths the client has.
 - Phase 3: Analysis and the Decision to Act
 - reducing large amounts data to a manageable number of issues.
 - resistance to the data (s
 - planning. It includes setting ultimate goals for the the best action steps or changes.
 - Phase 4- Engagement and Implementation
 - implementation may fall entirely on the line organization.
 - start implementation with an educational event.
 - Phase 5: Extension, Recycle, or Termination
 - the decision whether to extend the process to a larger segment of organization.
 - Clear picture of the real problem emerges.
 - process recycles and a new contract needs to be discussed
 - Engagement/implementation is when you finally do somewith enough impact to be noticeable to many people in and they have expectation that change, or will occur because of event.
 - Flawless Consulting
 - managing lateral relationships
 - client makes a demand, you don't necessarily have to obey
 - balance in lateral relationships is always open to ambiguity and negotiation
 - each act that expresses trust in ourselves and belief in the validity of our own experience is always the path to follow,

- is that trust in ourselves that serves us well with clients and increases the chances that our expertise will be used again and again.
- Chapter 2: Techniques are not enough
 - Overview
 - your own self is involved in the process to a much greater extent than if you were applying your expertise in some other way
 - Content and Sharing Feelings
 - both you and the client are generating and sensing your feelings about one another
 - Beyond Content
 - Increase your comfort level in words how you are feeling about the relationship as it's going on
 - Don't increase defensiveness on the part of the client.
 - Responsibility, feelings trust, and own needs,
 - Responsibility
 - client is taking at least 50 percent of the responsibility for the program.
 - makes sense at times to resist taking on this responsibility
 - Trust - more that any distrust is put into the more likely you are to build trust.
 - Your Own Needs - have needs for access to that organization talk to people to ask them questions. from that manager, are entitled to have your needs met,
 - Assumptions
 - assumptions the consultant has about what makes an effective org
 - about what your assumptions about good management might be
 - Problem solving requires valid data
 - objective data about ideas, events, or situations that accepts as facts and
 - Personal data - individuals feel about what is happening to them and around them
 - Effective decision making requires free and open choice - seem to work better when people have opportunity to influence decisions that have a direct impact ,
 - it them to apply themselves their internal commitment is required.
 - Goals
 - Est a Collaborative Relationship - promises maximum use of people's resources-both the consultant's It also spreads the responsibility for success or failure
 - Solve probs so they stay solved - managers have learned anything about how to solve similar problems and thus become more competent; for

solving a problem themselves next time requires that they that disturbing employee behavior is a symptom of more problems and that they should not ask others to address probs that belong to them

- Ensure attn is given to tech and relationships - technical/business problem that to be resolved and the way people are interacting around that prob
- Developing client commitment
 - Because consultants or support people have no direct control over they become dependent on line managers for producing results.
 - building internal throughout the consulting process.
 - Sometimes we decide to go to client's boss and urge him or her to direct the client to use our :ommendations but this is a risky proposition
 - We may cling to the fantasy that if our thinking is clear and logical, dut wording eloquent, and our convictions solid the strength of our arguments will carry the day.
- Roles Consultants Choose
 - in an expert role, a pair-of-hands role or a collaborative role*
 - Expert Role
 - find out what's wrong and fix it. You have a free hand to examine the whole system and do whatever analysis and fixing is necessary. Keep me posted on your findings and what you intend to do
 - a member of the manager's staff with delegated authority to plan and implement a program of change subject to the same restrictions as other members of the manager's staff.
 - Difficult for the manager to challenge expert reasoning
 - collaboration is not required because the problem solving efforts are based on specialized procedures.
 - Probs
 - consultant's ability to make an accurate assessment
 - problems that are purely technical are rare.
 - without valid data, accurate assessment becomes impossible
- Pair-of-Hands Role
 - consultant as an extra pair of hands
 - "I have neither the time nor the inclination to deal with this problem. I have examined the deficiencies and have tiepaied. an outline of what needs to be done. I want you to get it done soon as possible."
 - manager retains full control.
 - Probs

- is dependent on the manager's ability to understand what is happening and to develop an effective action - potential lack of the discovery phase.
 - avoid this trap, the consultant may ask for time to verify the assessment.
 - interpret such requests as questioning their experience their authority, or both.
- Collaborative Role
 - management issues can be dealt with only by joining his or her specialized knowledge with the managers knowledge of the organization.
 - their special skills to help managers solve problems themselves.
 - Manager must be involved in data gathering, analysis, setting goals and developing action plans, and sharing responsibility for success or failure
 - Probs
 - Consultants have special skills (for example in information technology or management) that managers see as a quick answer to their problems.
- Staging Involvement, step by step
 - leading up to implementation of a change~what are called the preliminary events can be divided into twelve specific action steps
 - Step 1: Define the Initial Problem
 - Ask the client to state what the problem is. If the client is thinking more of a new possibility than a problem, state this in your own words.
 - Step 2: Decide Whether to Proceed with the Project
 - If those expectations of yours are firm, we had better reevaluate whether we can give you what you want
 - Step 3: Select the Dimensions to Be Studied
 - It would help if you and the affected department managers would make a list the areas you would like investigated and also any questions you would like the software users to answer.
 - Step 4: Decide Who Will Be Involved in the Project
 - I be in charge of the project and make the major time commitment, but two people from your group will help the project immensely.
 - Doing the job by yourself is always simpler and faster, but directly encourages commitment and promotes eventual implementation of the work.
 - Step 5: Select the Method
 - the end users.

- Who else should I talk to? Should meet with people in a group or individually? What other areas operation should we look into, and how should we approach them?
- Step 6: Do Discovery
 - are two main risks in having the client do some of discovery: (1) people may withhold information because they are to those who have some power over them, and (2) some of may be distorted because the line organization has a stake in making themselves look competent and guilt free
 - If need be, you can go back to the people a second time, alone
- Steps 7 Through 9: Funneling the Data and king Sense of It
 - Funneling a huge amount of data into a manageable amount of info, summarizing it, and making sense of it takes a lot of time
 - Client's lack of background is our favorite excuse for excluding him or her at various stages
- Step 10: Provide the Results
 - When line managers have the experience of reporting negative findings their defensiveness goes down and the feedback step is less likely to become an argument.
- Step 11: Make Recommendations
 - More than any other stage, developing workable recommendations requires integrating your technical knowledge and the client's practical and organizational knowledge.
 - Ask the client what he or she would do about the situation having now heard the results of the inquiry.
- Step 12: Decide on Actions
 - "We will think about it and let you know when we think the organization will be ready for this. " - oh geez
 - → I would like to be a part of the meeting when you discuss this. I care a lot about the project and know I could contribute to the question of timing and implementation.
- Chapter 3: Flawless Consulting
 - Being Authentic
 - 2 Questions:
 - 1. Am I being authentic with this person now?
 - 2. Am I completing the business of the consulting phase I am in?
 - Authentic behavior with a client means you put into words what you experiencing with the client as you work.
 - Lower trust leads to lower leverage and lower client commitment.
 - Examples of auth communication
 - This is not the role I feel is most effective.

- I am eager to get to the current issues. What is the key problem now?"
 - Creating distance is a form of resistance to the consultant's help and serves to reduce its impact
- Completing the Requirements at Each Phase
 - Contracting
 - 1. Negotiate wants
 - 2. Cope with mixed motivation. - part of contracting is to get this mixed motivation expressed early in the project so it won't haunt you later.
 - 3. Surface concerns about exposure and loss of control. n what they are concerned about is (1) Are they going to be made to look like a fool or (2) Will they lose control of themselves, their organization or you the consultant?
 - 4. Understand triangular and rectangular contracts. - roles need to be acknowledged , clarifying who is involved and getting them the contract
 - Discovery and Inquiry
 - 1. Layers of inquiry. The initial problem statement in a consulting project is usually a symptom of other underlying problems.
 - 2. Political climate.
 - 3. Resistance to sharing information
 - 4. The interview as a joint learning event - we are never simply neutral, objective observers
 - Feedback and the Decision to Act
 - 1. Funneling data. At the end data needs to be manageable, actionable and around something that's in the client's control
 - 2. Presenting personal and organizational data - management style, context in which our recommendations might be implemented.
 - 3. Managing the meeting for action - is the moment of highest anxiety for both client and consultant
 - 4. Focusing on the Here and now.
 - 5. Don't take it personally - reaction of the client is a process of dependency and receiving help, more than it is resistance to your own personal style.
 - Engagement and Implementation
 - 1. Bet on engagement over mandate and persuasion - instinct is to too much on the decision and not value the importance of people are brought together to make it work
 - 2. Design more participation than presentation, don't just sell it
 - 3. Encourage difficult public exchanges. Create room for doubt and cynicism

- 4. Put real choice on the table. - Commitment > Perfection
 - 5. Change the conversation to change the culture. Encourage dialogue that is void of blame, history; attention to who is not in the room and is too quick to action.
 - 6- Pay attention to place - Most of the places where meetings are held reinforce high control and mandated strategies.
- Because of our desire to get a project going most of us have a tendency to overlook and downplay early resistance and skepticism
- If consultants really believe that they should be responsible for implementing their recommendations they should immediately get jobs as line managers and stop calling themselves consultants.
- Accountability
 - All you can do is to work with clients in a way that increases the probabilities that they will follow the advice make the effort to learn how to operate the furnace or make the effort to deal with others in a different way.
 - Our need for concrete demonstration of our results is either to reassure our doubts or serve our needs to market our services.
- The Right to Fail
 - It is often for managers to accept help and be publicly open to suggestions
 - Managers have a right to suffer, and as consultants we are usually too much on the periphery of their lives to really change this.
 - You may be taking on a task that you are not positioned to accomplish.
 - Your own responsibility as a consultant is to present information as simply, directly and assertively as possible and to complete the tasks of each phase of the consultation.
- Chapter 4: Contracting Overview
 - The point of maximum leverage for consultants is probably during the contracting phase of the project
 - contract is simply an explicit agreement of what the consultant client expect from each other and how they are going to work together.
 - Social contract for clear communication about what is going to happen on a project
 - Can be written when possible, but should be conversational in nature, not super formal
 - Mutual Consent - how motivated is consultant and line manager to take on the project together, shoulds / coulds
 - Valid Consideration - exchange of something of value between consultant and client, needs
 - Operational partnership, access to people and information, time of people, opportunity to be innovative

- Having direct discussions with the client-about control, vulnerability, your wants, the chance of success, and how the discussion is going, makes the difference between an average contracting meeting and an excellent one
- Elements of a Contract
 - Boundaries of Your Analysis
 - Objectives of the Project
 - Kind of Information You Seek
 - Come close, but not too close.
 - There is always some desire for confidentiality at the organization is doing the best that can be done under the circumstances
 - Technical data, figures, and work flow; attitudes of people toward the problem - and roles and responsibilities
 - Your Role in the Project
 - Jointly developing recommendations?
 - Help you help yourself solve it next time?
 - The Product You Will Deliver
 - Feedback oral or written?
 - How long will the report be?
 - How much detail?
 - How far into specific recommendations will you get?
 - Will you give a list of steps that can be implemented right away?
 - Will you present actual solutions or steps?
 - You can guarantee a solution to a problem but you can't guarantee that the solution will be followed
 - Support and Involvement from the Client
 - Schedule - Include starting time, any intermediate mileposts, and completion date
 - Confidentiality
 - Feedback to You Later - optional
- Chapter 5: The Contracting Meeting
 - Almost every event and action carries a message to it
 - Clients are: people who attend the initial planning meeting, set objectives, approve action to be taken, receive the report of your work, are significantly impacted by your work
 - Steps to the Meeting
 - Figure Page 71
 - Step 1: Make a personal acknowledgement - Good to make personal statements about feeling about being at the meeting today
 - 'Any thoughts or concerns you have about working with me on this project?'
 - Step 2: Communicate Understanding of the Problem

- Behind the eagerness is often the line manager's belief that situation is unique in some aspects and this organization is really special → client's declaration of uniqueness is often accompanied by doubt the consultant can understand the situation
- Acknowledge the Unique Aspects of the Situation → "Your situation has several unique things that make it both interesting and frustrating."
- Restate, in Your Own Words, Your Perception of the Problem
 - What you are accomplishing is letting the client know that are listening and have enough technical expertise to grasp the ion quickly → "This is the kind of situation that makes good use of my background I can help"
 - Use short, simple sentences
 - Respond to underlying concerns of uniqueness, complexity and whether the client can be helped → The situation seems workable
- Step 3. Client Wants and Offers
 - The skill in surfacing constraints is to ask clients directly for any thoughts they have on how you should work with them and what constraints exist on the way this project will be conducted
- Step 4. Consultant Wants and Offers
 - This pure service orientation can be self-defeating
 - The consultant wants we are talking about here include such things as he need for enough time to do the job right, access to the right people and information, support from the client at difficult moments, people from the org to work on the project, confidentiality, follow-up to the recommendations, and uninterrupted time from the line manager.
 - essential wants and desirable wants - Knowing what is essential comes with experience and from getting burned a few times
 - If you're stressed or at an impasse, take a break - 3 or 4 minutes
 - What you are suggesting makes great sense but it xs not give me what I consider to be essential for the success of this proj
 - We think we need elaborate justifications and explanations, but we just need to state authentically and simply and directly what we need to get the job done
 - How To:
 - 1. State the want first in simple street language
 - 2. Be quiet and let the client react
 - 3. If the client has questions give a two-sentence answer and restate the want
 - 4. Be quiet and listen for a yes or no

- Step 5: Reach Agreement
 - If, as in most cases you can reach agreement you should pause for a moment and just feel good about it!

-