McDonald's Corporation

A leadership development program designed specifically to help participants prepare for success in meeting the increased challenges and demands of one of the roles most critical to success of the business

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Background and Rationale

Business Context and Need for the Leadership Program

In early 2001, the HR Design Center for McDonald's Corporation initiated the development of a special leadership development program for a select number of high-potential managers identified as candidates for possible promotion into a key role in its system, that of Regional Manager. The program developed was entitled the McDonald's Leadership Development Experience. This chapter will describe what differentiated this program from other leadership development activities that had previously been offered within the company, what program elements worked particularly well (and which didn't), and how this program has helped to influence both the training methodology as well as substantive content of current and future planned leadership training initiatives at McDonald's.

There were a number of factors that led the company to support this initiative. First, the Regional Manager role was a very significant one within the overall operations structure of the business. At the time of this initiative, individuals in the Regional Manager positions were responsible for managing regions that were comprised of 300-400 stores that generated $480--$640 million in revenue. The Regional Manager position was not only considered a significant business responsibility but also a key stepping stone for many individuals who were thought to be capable of advancing to the senior executive level of the company. Another factor that helped create a felt need for developing a special leadership development program focusing on future candidates for the Regional Manager role was the fact that the expectations and challenges for this position had shifted significantly over the previous 5-10 years as a result of both changes in the marketplace as well as within McDonald's. These changes included: heightened competition, the increased challenge of growing market share, RM's being given more autonomy as the organization became more decentralized and moved decision-making closer to the market/customer, and the growing expectation for RM's to act strategically as well as tactically. Given this evolution in the role, it was decided to develop an accelerated leadership development experience that could assist potential future RM's to be better prepared to meet these new expectations and challenges.

~~.(Jim – keep this sentence as you had it. I was trying to edit it and couldn't come up w/ anything better!)~~

A final factor that helped lead to and influence the development of this program was a study that had been conducted during the year 2000 and that was designed to develop a Regional Manager Success Profile. The intent in developing this profile was to provide a sharp picture of what superior performance in the Regional Manager role looked like in order to guide both the future selection of individuals for and the development of individuals (already in) this position. The development of this profile involved interviews with the President of the North American business, all five Division Presidents reporting to him, key senior human resources executives, selected others who had a clear perspective on the role and demands of the RM position, and selected "star" performers in the RM position. The content of the interviews focused on identifying:

1. how the business had changed in the past 5-10 years,
2. how these changes had impacted on "the recipe for success" in the RM role,
3. the critical results and competencies that differentiated the "star" performers from the average ones,
4. what experiences were felt to be key to the preparation of someone to step successfully into the role and the kinds of problems that had de-railed some individuals who had been put into the position.

The Regional Manager Success Profile that emerged from this work (and was finalized in early 2001) identified both the key results that the top RM's needed to produce and the critical competencies that they needed to be able to demonstrate in order to excel in the position (see Exhibit 1). The availability of this success profile made the design of a customized leadership experience for developing future RM's easier and more effective.

In addition to the "success profile" that emerged from this process, a variety of other useful information was gathered in the course of this preliminary work that has proved valuable in guiding the ongoing efforts to design training and development initiatives for regional manager leadership. Key elements of this additional information include:

- specific examples of 10 critical but common practical leadership challenges that individuals stepping into the RM role might expect to face and which they must be prepared to handle if they are to be effective (e.g. inheriting a region that has been steadily losing market share, needing to significantly upgrade the talent/morale level of the regional staff team, needing to strengthen or re-build trust and credibility with the owner-operators, etc.) and

- identification of the kinds of jobs/experiences that an individual might have prior to becoming an RM that would help to better prepare him/her for taking on the role.

While some elements of this additional information were incorporated in the "Leadership Development Experience" (that is the primary focus of this chapter), other aspects are just beginning to be used to help shape a broader and more complete set of development programs and experiences that are being designed to better prepare future leaders for success at the regional leadership level throughout McDonald’s.

Objectives of the Leadership Development Experience

The design of the leadership development program for high-potential RM candidates had a number of key objectives. These included:

1. help participants take a critical look at themselves and their current management capabilities and develop an individualized personal learning plan that could help them to increase their likelihood of future success as RM’s,

2. provide participants with an action-learning assignment that would help them grow in their understanding of the business while, at the same time, contributing to the development of practical ideas to address the significant business issues they worked on,

3. provide participants with an opportunity to build relationships with key peers from across the organization with whom they could partner as part of their ongoing development,

4. provide significant exposure of the candidates to senior executives in the organization and vice versa, and

5. demonstrate the potential value and power of “action learning” as a new model for accelerating the development of leaders and as a way to complement the more classroom-based approaches that were already in use.

Assessment of Participants

The Role of Assessment

It was decided that the Regional Manager Success Profile would be used not only to shape the design of the overall program but also as part of the process of assessing the strengths and development needs of individuals who were participating in the program. While a number of the individual candidates selected for this program had been through various management assessment experiences at different points in their careers, none of these assessments had been tailored to evaluate the individuals against the more specific demands and requirements associated with success in the RM role. Thus, the RM Success Profile provided a tool that was uniquely tailored to help the individuals better understand their readiness to step into the role and to identify the kinds of development needs they might need to address to enhance their likelihood of effectiveness in it. As will become apparent later in this chapter, the opportunity to get feedback about one’s readiness for promotion into a specific role (rather than just feedback about generic management skills) turned out to be one of the more compelling aspects of this leadership development experience for the participants.

It should be made clear that all fourteen participants who had been identified as high-potential candidates for future advancement to the RM role were assessed after they were selected by their Division Presidents for inclusion in the program. In other words, at this stage, the assessments of individuals against the RM Success Profile were not used as the basis for selection into the high-potential group and this leadership program.

The specific objectives of the assessment of individual participants were to:

1. provide individuals with an evaluation of themselves against the RM Success Profile so that they could identify key strengths to build on and key development areas to work on in order to enhance their potential effectiveness in the RM role, and

2. provide the organization with data on development areas the group might benefit most from having targeted in this and other future leadership development programs.

Process and Approach

The assessment process was conducted by a team of external consultants (Ph.D. psychologists) and took place between the time that participants were told they had been selected for the program and the time that the program was launched.

The assessment process itself included:

(1) having participants complete pre-work including:
- a self-assessment against the 14 competencies that comprised the RM Success Profile,
- a brief survey regarding the extent to which they had had the opportunity to already be exposed to, manage, and learn from a set of six learning challenges that were similar to practical on-the-job leadership challenges typically faced by RM's, and

- a brief synopsis of their career histories highlighting key jobs/learning experiences on the path toward the RM role

(2) an in-depth (3-4 hour) behavioral-event focused interview designed to evaluate the individuals' career accomplishments and experience against the key elements in the RM Success Profile (e.g. results "track-record" as well as competencies demonstrated).

Insights Emerging from the Assessment Results

While there was considerable variability across the individuals assessed it was apparent that, as a group, the participants would benefit most from a program targeting development in the competency areas of:

- Strategic Perspective,
- Maximizing Business Performance,
- Insightful Listening,

- Problem-Solving and Innovation, and
- Mental Agility

Further, when the participants were evaluated in terms of the extent of their prior learning as a result of opportunities to deal with the various types of key leadership challenges they would likely face as RM's, it was clear that a number of them had a somewhat limited view of how to lead the business due to:

- having "grown up" primarily in a single region and thus having seen a fairly limited set of business conditions/challenges,
- working for relatively few Regional Managers, thus limiting the modeling of varied leadership styles and approaches in operating as an RM, and
- being accustomed to focusing primarily on executing the plans and tactics developed for them at more senior management levels (rather than having personal responsibility for formulating strategy/vision).

These insights regarding the needs and readiness of individuals targeted for development for the Regional Manager role were used both to shape the leadership program described here and are currently being leveraged to shape training initiatives for the future.

Initial Feedback and Coaching

Prior to the start of the leadership program, the individual consultants who had conducted the assessments met with each individual participant in a one-on-one session to discuss his/her results. The intent of this meeting was to help participants identify areas of personal learning needed **prior** to the start of the program so that they might be able to begin to take advantage of opportunities to learn or practice new behaviors in the course of the program itself. This feedback session also set the stage for subsequent work on the development of personal development action plans for each participant that was to take place during and after the action learning program itself.

The Program

Designing the Leadership Development Experience

A number of factors and influences were used to help shape the design decisions for the leadership program. Among these were the results of the initial work done to create the RM Success Profile, the results of the initial assessment of the skill and development levels of participants against elements of the success profile, and an understanding of the kinds of leadership development experiences that these participants had already been part of in the past.

These considerations helped identify some specific needs and opportunities and led to the design of a leadership development program intended specifically to:

- provide participants with the opportunity to learn, practice, and demonstrate key competencies identified as in need of development including:
    - think about the business more broadly and strategically
    - mental agility and creativity in problem-solving,
    - listening/collaboration skills, and

- expose participants to selected Regional Manager role models who could expand their perspective about the RM role by sharing some of their key experiences and learnings in the position

- provide participants with the opportunity to work closely with senior level executives from whom they could learn (about leadership and about the business)

- give participants an action-learning assignment that addressed real issues facing the business overall (and that would complement typical classroom-based training offered)

- provide participants with an experience that was both organizationally relevant (tied to achieving McDonald's growth objectives) and personally relevant (tied to developing specific competencies needed for success in the RM position to which they aspired)

- take place in a concentrated period—90 days with a definite commitment to present results to the President of the business and his team

Content of the Program

The program consisted of four phases over a period of 6-12 months.

<u>Phase One</u>

In Phase One, the participants met initially for 3 ½ days. Content in this phase included:

- strategic business context for the program and for their development as a group,
- introduction of personal learning journals to be used throughout,
- explanation of the basis for the RM Success Profile and a presentation of the aggregate profile results for the entire group,
- initial individual development planning,
- the use of learning partners,
- presentations on the business from "star" RM performers,
- introduction of the group to the two action learning assignments,
- introduction of Division President champions who would assist each learning group through the process,
- development of team charters for tackling their action learning assignments,
- presentation of their initial work on their issue to senior management, and
- recording of personal learnings from the initial meeting.

The Action Learning Assignments

The "action learning" assignments were tied to specific business issues/questions that had been identified as "high-priority" by the senior leadership of the company. The actual business issues/questions selected were, in fact, drawn from a list of key initiatives identified as part of a "Blueprint Plan" developed at the Corporate level to drive and support doubling the size of the business in 10 years. It was believed that tying the program content to the business strategy in this way would make the learning experience more real and compelling for thee participants and the output more valuable to the business.

Phase Two

Phase Two consisted of the next 90 days over which the two action-learning teams tackled their respective assignments:

> Group One: Identify opportunities and make recommendations to simplify marketing and operations within all the regions, and
>
> Group Two: Make recommendations for how to transform the critical role of business consultant in the regions in order to support the company's growth objectives.

During this phase, the groups met on several occasions to brainstorm and refine ideas, members carried out individual assignments (gathering data, accessing experts throughout the system for interviews) and learning partners connected with each other to stay on track with their individual learning objectives.

Phase Three

Phase three involved the entire group of participants re-assembling at corporate in 90 days to present their results and recommendations to senior management.

Phase Four

Phase Four involved senior management actually implementing the many of the ideas developed by the learning groups as well as ongoing follow-up and coaching of individual participants.

Tools, Instruments and Training Materials

There were a number of support tools, instruments and training materials that were developed and used throughout the program. Among these were:

- RM Success Profile
  - This profile was developed as a "blueprint for success" for individuals in the RM role. It includes a picture of both the competencies and the results that must be demonstrated and produced by RM's in order to excel in the role. It is provided as Exhibit 1

- Individual participant assessment and development reports developed by the external assessors with and for the individual participants. These reports identified individual strengths and weaknesses relative to the success profile.

- Personal Learning Journals for each participant that focused on identifying his/her learning needs and objectives, significant learning events and insights, and ongoing progress.

- Action Learning Tools including:
  - Team tools (e.g., Project Map, Team Charter (see Exhibit 2), Roles & Responsibilities Chart, Team Metrics (Exhibit 3), Team Communications Model, Team Process Check (Exhibit 4)),
  - Project tools (e.g., Stakeholders Commitment Chart, Data Collection Methods: Pros and Cons (Exhibit 5), Affinity Diagram, Force-Field Analysis (Exhibit 6), Flowchart Process Measures, Cause and Effect Diagram, Project Review Checklist (Exhibit 7)) and,
  - Presentation tools (e.g., defining your audience needs, presentation choreography, organizing the presentation content, using visuals effectively)

Reinforcing and Building on Learning

While the program was well received by participants it was felt important to take some specific steps to reinforce the learnings gained by participants. Examples of some of these steps included:

- Follow-up memos to the group regarding program outcomes
- Progress reports on the specific participant recommendations that had been implemented
- Providing feedback to the managers of the participants so that they could reinforce ongoing learning, and
- Follow-up progress checks with individual participants by executive coaches on implementation of development plan ideas

Integration with the HR systems in the organization
In order to reinforce the participants' learning from the program experience steps were taken to help participants be able to connect their "program specific" insights and learning plans with the overall organization's ongoing personal development system and processes. These included:

- Showing participants how the unique job-specific competencies developed as part of the success profile for the RM position linked to the organization's more generic Core & Leadership competencies that serve as a key component within the overall Performance Development System.

- encouraging participants to take their specific learning and development goals/plans emerging from this program and “add them to” the development plans that they had put together with their managers earlier in the year,

- providing participants with information on how to use the in-house resources for competency development and link it to the kinds of personal development needs identified in this program,

- offering additional external resources for personal development (e.g. coaching) where required for specific development needs.

Evaluation

Methods and measures

Efforts were made to identify and gather both process and outcome oriented measure of the program's effectiveness. Examples of the evaluation data collected included:

- Questionnaires of participants at the end of each of the four phases of the program
- Invitation of comments and suggestions from all of the senior executives involved with the program/participants
- Data on completion and implementation of individual action plans
- Tracking of participants' promotions and job success
- Follow-up phone calls and surveys to program participants one-year after program completion

Program Outcomes

The evaluation data gathered to date include both information on objective outcomes that have occurred with participants as well as their subjective assessment of program impacts.

<u>Objective Data on Program Impact</u>

- The recommendations presented by two teams were both adopted and integrated into the Strategic Agenda for the U.S. business in 2002. One focused on simplification at the restaurant level, and the other focused on the redefinition of the Business Consultant's role,

- Ten of 14 participants have been successfully promoted into key regional leadership positions. Thirty percent of those promoted into these key leadership positions were rated at the top of the performance rating scale after only six months in position in their new jobs. The remaining 70% were performing at a strong level.

<u>Subjective Assessment of Program Impact</u>
Results of the one-year follow-up survey with program participants indicated that they felt the Action Learning experience and the feedback/insights on their own individual effectiveness and development needs has helped them to be much more effective in their current roles as a result of their:

- having learned the importance of and practicing better listening skills, particularly when working in groups (e.g. allowing others to express their opinions, understanding before reacting, etc.)

- recognizing the value of teams and diversity of thoughts (e.g. one GM provided the example of how the learnings from the program helped him to assemble his team during the restructure – picking talented individuals to maximize the strengths of his team)

- looking at the business differently today (e.g. with more strategic perspective, big picture thinking, focusing on building a foundation for the future vs. just short-term results, etc.) as a result of the program reinforcing their understanding of the notion of linkage and how the many different aspects of the business need to be considered when making changes.

- enhanced communication with and leveraging of people/idea resources within the broader McDonald's system.

- putting increased emphasis on their efforts to coach and develop others,

- being exposed to different management styles that allowed them to realize the strengths of different approaches,

- becoming more self-aware and beginning to put more emphasis on their own personal development by working on the specific issues/opportunities that were targeted in the feedback from their personal assessments.

Critical Success Factors

Feedback from participants indicated that there were a number of key features of the program and its design that helped make it successful. The participants especially appreciated:

1. Having the ability to make a significant contribution to the business through working on real business problems and seeing their recommendations implemented by senior management

2. Having their own personal success requirements articulated in the context of a leadership model tailored to the RM position to which they aspired (as opposed to a more generic model of leadership effectiveness)

3. Getting personal feedback and coaching based on the assessment of their competencies and "readiness" for advancement

4. Having the opportunity to network with highly talented peers as well as "content experts" in other areas of the business and build relationships with them

5. Having senior managers be available, involved, and engaged in the action learning program,

6. Having the opportunity to be part of a learning group comprised of individuals with a real diversity of members (e.g. thinking style, work approach, ethnicity, etc.)

7. Having the opportunity to significantly broaden their understanding of the organization and view of the business

Lessons Learned—Opportunities for Improvement

While the feedback from and about the program was generally quite positive there were also some specific opportunities for improvement identified. These included:

- Use of learning partners – participants indicated that they did not have enough time to interact closely with their learning partner during the course of the program. While they liked the concept there just wasn't enough time to really get to know and "bond with" partners during the program.

- Assessment results linkage to program —while the individualized feedback that participants received relative to the RM Success Profile prior to the program was felt to be very helpful, participants indicated that it could have been better linked to the specific development activities contained in the Action Learning program three-day kick-off and follow-up sessions.

- Assessment results linkage to IDP's--While all of the participants expressed that the individual assessment component of the program had increased their self-awareness of strengths and development needs and had worked to make positive behavioral changes, none of the participants had incorporated the assessment results into their formal individual development plans (that had been put together earlier in the year prior to the program). Part of this was simply due to a lack of time but more could have been done to facilitate this linkage between program information and the ongoing performance development process within the company.

- Improving the assessment process—While a number of the participants found the personal assessment process to be quite valuable many felt that its value/impact could have been heightened by gathering and including 360-degree feedback to supplement the data gathered in the interview conducted by individual assessors (this suggestion has already been implemented). In addition, participants felt that their should have been greater clarity from the very start with regard to who in the organization would have access to the results of their assessment data (i.e. some understood that their data would be shared with their managers and others understood that it was confidential—for them only).

Additional Impacts Realized Since Program Completion

While the main objectives in developing the program and its success in achieving them have been described above, there were a number of additional impacts of the program that have also been realized within the organization. These include:

- The success of the program set the stage for the establishment of a senior level position devoted specifically to executive development

- The positive response to the "success profile" developed specifically for the RM position and used to shape this program set the stage for increased use of a leadership competency model and for a commitment to develop additional job-specific "Success Profiles" to differentiate the effectiveness and potential of individual managers

- This program demonstrated the viability and value of the action learning approach to leadership development within McDonald's. As a result, "action learning" has now become the preferred methodology for developing leaders in the organization and will be embedded in an accelerated development program for high potentials that is currently under development for rollout in late 2002.

Direction of Future Programs

The initial plan was to build on the learnings from this offering of the Leadership Development Experience (conducted in mid 2001) to provide enhanced learning programs targeted to both the participants who had been part of the initial program as well as to additional individuals identified as high potential candidates for advancement to the RM role in 2002.

In late 2001, the McDonald's restructured its U.S. business resulting in a consolidation of both regions (from 38 to 21) and divisions (from five to three). This reorganization resulted in the creation of new leadership roles with broader scope and responsibilities. In response to this re-structuring, success profiles for these new leadership positions are currently being developed to aid in the assessment and development of the job incumbents and those identified as having potential for these positions. When the profiles for the new leadership positions are completed, plans will be developed to create revised learning programs and offerings to support the development of individuals operating in or being considered for promotion to these positions.

In designing these future program offerings, all the lessons learned in this initial action-learning Leadership Development Experience will be leveraged. In addition, specific attention will be paid to developing new strategies to enrich and accelerate the learning experiences for "high-potential" individuals so that they can be better prepared and ready sooner for taking on increased responsibilities. As mentioned earlier, one of the constraints on the development of individuals for the RM position (that was identified in the study conducted in the preliminary study conducted in 2000) was that a number of individuals who had been promoted to the role in the past had often been exposed only to a very limited number of business challenges and leadership styles while "growing up" and had often gained all of their experience in a single region or two.

Possible future approaches to dealing with these considerations and working to broaden the perspective and skill sets of potential future RM's may include:

- Identifying a pool of high potential promotable individuals who will be given systematic exposure to a set of targeted developmental opportunities over a longer period of time (2-3 years)

- Specifically working to assist future candidates for regional manager leadership to be better prepared for effectively managing the 10 most challenging business/leadership problems/opportunities typically faced by general managers of the regions. To accomplish this, a systematic effort will be made to give all candidates exposure to these situations so that they can learn relevant skills and perspective prior to their actually being promoted. This exposure for purposes of learning may occur through:

    - The case study method that would involve the high potential group members exploring and learning from how a given situation was handled in the past in a specific region (or regions) in which it occurred. This approach might involve the actual regional managers who were part of the real-life situation that is captured in the case study, or

- identifying when current local business conditions create potential powerful leadership learning opportunities in specific regions and developing a process to involve the members of the high potential group in the actual working through of these leadership challenges in "real-time" (e.g. situations that might present themselves only on occasion and that many potential future RM's may not otherwise be exposed to prior to stepping into the position if their experience is restricted to their own regions).

Summary

This chapter described the development and implementation of a leadership development program targeted to help prepare selected candidates for advancement into a key leadership position for the McDonald's business (i.e. Regional Manager.) The combination of doing preliminary work to identify the specific requirements for success of leaders in this role (vs. taking a "generic" approach to leadership) and the use of a more practical and engaging training method (action learning) resulted not only in producing significant benefits for the initial program participants but also in helping to set the stage for influencing the design of current and future leadership initiatives within the company.

About the Contributors

James Intagliata is President and founder of The NorthStar Group, a management consulting firm that specializes in senior-level executive assessment, individual leadership coaching, and competency-modeling. Over the past 20 years he has consulted to a diverse group of clients who range in size and maturity from venture capital backed start-up companies, to medium size businesses striving to get to the next level, to Fortune 100 companies dealing with dramatic new challenges in their business and marketplace. In addition to his consulting work, he has held faculty positions at the State University of New York at Buffalo and the University of Missouri at Kansas City and taught organizational theory and management at the graduate level. He received his Ph.D. in Clinical Psychology in 1976 from the State University of New York at Buffalo. His published articles include: "Leveraging Leadership Competencies to Produce Leadership Brand: Creating Distinctiveness by Focusing on Strategy and Results" (with co-authors Dave Ulrich and Norm Smallwood) in Human Resources Planning, Winter, 2000.

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Exhibit 1

Regional Manager Success Profile

Results	
Types	**Metrics**
Employee	• Staff and commitment survey results. • Understanding of company strategy/future vision • Solid staff expertise • Performance standards and accountability for results • Development of leadership talent for the System.
Customer	• Customer-count targets • QSC&V standards scores • Customer experience feedback
Owner-Operator	• Owner-operator feedback/confidence • Results-focused O/O teams • Engagement of O/O's with the strategic platform • Operator cash flow targets
Structure/Process	• Performance on corporate initiatives • Infrastructure/process improvements
Financial	• Operating income targets • Positive Economic Profit (EP) contribution • Net new unit plan targets
Competencies	
Thinking Skills	• Mental Agility • Focus and Balance • Strategic Perspective • Problem Solving and Innovation
People Skills	• Self Management • Insightful Listening • Impact and Influence • Mature Assertiveness • Teamwork and Collaboration • Communicates Effectively • Peer Leadership
Business Understanding	• Marketplace Perspective • Maximizes Business Performance • Financial Acumen • Business Judgement

Exhibit 2

Team Charter--Sample Format

Team Leader, Members, and Sponsor (if appropriate)	
Team Purposes	**Links to Organization's Context**
Task purpose Interpersonal purpose	(How the purpose contributes to specific plans and objectives, addresses gaps in the organization's performance, and/or addresses specific customer needs)
Process to Be Used	**Success Measures and Progress Measures**
(e.g., specific problem-solving methodologies, information technologies, conflict-resolution techniques)	(e.g., cycle time, error rates, and/or costs to be reduced; productivity to be increased customer satisfaction to be improved; gaps to be closed)
Boundaries of the Team's Work	**Resource Availability/Constraints**
(e.g., issues outside of team's scope, beginning and end points of a process to be improved, decision-making authority)	(e.g., budget, equipment, training)
Key Milestones	**Team Member Time Commitments**
(e.g., formal reviews, deliverable dates, final deadline)	
Team Operating Principles	

Exhibit 3

Team Metrics

	Subjective Measures			Objective Measures		
Team Metric						
Description						
Responsibility						
How Measured						
Variance						
Kick-off						
Frequency						
Status						
Issues						

Exhibit 4

Team Process Check

Meeting Goals/Focus	
0 1 2 3 4 5 6 7 8 9 10	
Confused, diverse, conflicting, unrealistic, misaligned, uninteresting to members	Clear and shared by all, important to all, well aligned; engaging to all
Planning/Tracking	
0 1 2 3 4 5 6 7 8 9 10	
No agenda or did not follow agenda; poorly planned	Agreed-upon agenda, followed in sequence, no wasteful digressions
Meeting Participation/Involvement	
0 1 2 3 4 5 6 7 8 9 10	
A few key members dominating and some members not participating	Everyone contributes and is involved in discussion and team process
Listening/Communicating	
0 1 2 3 4 5 6 7 8 9 10	
More than one person talks at a time; repetitions, interruptions, and side conversations; little quality inquiry and advocacy	One person talks at a time, others clarify and build on ideas; good balance of advocacy and inquiry
Member Trust/Openness	
0 1 2 3 4 5 6 7 8 9 10	
Members distrust each other, keep their thoughts to themselves, and don't explore others' data, positions	Mutual trust and open exploration of others' data, positions
Productivity/Driving Results	
0 1 2 3 4 5 6 7 8 9 10	
Team decision-making process breaks down; unable to reach decisions, resolve conflicts, or focus on results	Participate process to reach consensus decisions, able to surface and resolve issues to reach results

Exhibit 5

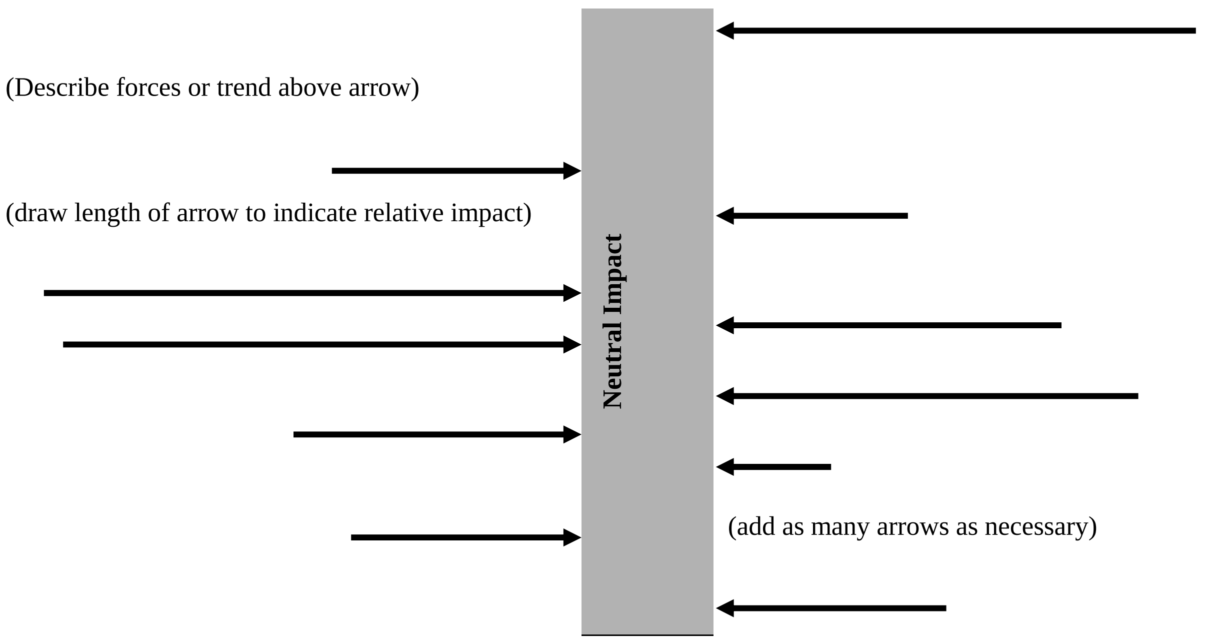
Pros and Cons of Data Collection Methods

	Pros	Cons
One-on-One Interviews	• Opportunity to build relationships with those interviewed. • Direct/indirect nonverbal communication will allow you to pick up additional information. • Details can be clarified when necessary.	• Getting access to the people you need to interview may not be easy. • Telephone interviews sometimes catch people off guard and keep them from communicating. • Those not interviewed may feel "discriminated against."
Focus Groups	• You can get a lot of data in a short period of time. • Group synergy can lead to deeper inquiry. • Allows you to obtain several points of view.	• Scheduling may be difficult. • There is a risk of "group think" or self-censoring in front of group. • Process may become dominated by strong or vocal leader.
Surveys	• You can get a lot of data, inexpensively, from many people. • You can get information from people who may otherwise be inaccessible. • Anonymous answers promote greater openness. • Can be used to alert the organization as part of an intervention.	• Questions cannot be clarified. • You can't identify the exact sources of the responses, so they be difficult to interpret. • You may not receive open and honest answers to all questions. • Require attention to design and implementation.
Direct Observation	• You get first-hand information from what you personally observe. • There is less chance of misunderstanding from someone else's observation. • You can redirect your focus as situation change.	• You may not have access to the situations that need to be observed. • Direct observation may alter the situation being observed. • It may difficult to observe enough situations to be able to make generalizations.
Analysis of Existing Date	• Saves time, money and resources. • Data may be more respected from primary researcher. • You may get information that you would not otherwise have access to. • What others don't see as relevant may be vitally important.	• The data may be incomplete, unreliable, or out of date. • The data may be difficult and or time consuming to obtain or understand. • Data obtained may be irrelevant to your research.

Exhibit 6

Force-Field Analysis

Driving or Supporting Forces and Trends	Opposing or Restraining Forces and Trends



Notes on using Worksheet

Identify the force or trend whether it is a positive or negative impact on the project.

Label the force or trend on the appropriate side of the central (neutral impact) axis.

Immediately under the label, draw an arrow whose length reflects the team's perception of the relative amount of impact that force or trend is likely to exert on the project's success-short arrows indicate minor impact; longer arrows indicate major impact.

Exhibit 7

Project Review Checklist

Task	Applicable	Time Needed	Date Needed	Done
What Planning the Execution of the Project:				
• Set project review dates at the start of the project.	☐			☐
• Ask project team members to keep the dates sacrosanct on their personal calendars.	☐			☐
• Create a template so that each member can report progress on his or her part of the project in a standardized way.	☐			☐
• Ensure the project sponsor is aware of the dates.	☐			☐
Before the Review:				
• Identify all participants; send announcements	☐			☐
• Specify the goal of the review.	☐			☐
• Develop an agenda with times for specific areas if the review is going to last longer than three hours	☐			☐
• Prepare pertinent materials and distribute them well in advance	☐			☐
• If needed, arrange for logistics support (room, coffee, food, audio-visual support, etc.).	☐			☐
During the Review:				
• Welcome participants and make any introductions.	☐			☐
• Ask for someone to act as a recorder and take notes unless there is a formal secretary.	☐			☐
• Set goals for the review.	☐			☐

Task	Applicable	Time Needed	Date Needed	Done
During the Review (continued):				
• Review agenda; modify as needed.	☐			☐
• Announce decision-making model.	☐			☐
• Describe relevant rules and processes.	☐			☐
• Monitor group processes.	☐			☐
• Stay focused on the task.				
• Sum up at the end of discussions.	☐			☐
• Ensure the recorder has captured any decisions before moving on.	☐			☐
• Watch the logistics and timekeeping. If people have effectively finished their contribution, offer to excuse them if they wish.	☐			☐
• Before the end, review decisions reached.	☐			☐
• Develop any action plans needed.	☐			☐
• Ask participants to evaluate the effectiveness of the review.	☐			☐
• Thank participants.	☐			☐
After the review:				
• Follow up with minutes as soon as possible. On a fast-moving project they should be issued the same day.	☐			☐
• Implement action plan.	☐			☐