

VISION, DECISION-MAKING AND COMMUNICATION SKILLS IN AN
ENTREPRENURIAL SALON AND SPA

A Master's Thesis Field Project

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ABSTRACT

The client for this project was a full service salon and spa that specialized in a variety of beauty and wellness services. According to its literature, the goal was to create a salon “where artists nurture natural beauty, embrace community and uphold independent style.” It was owned and managed by a female artist and eyebrow specialist, who had an extensive background in the beauty industry, but who had, prior to my work with her, never managed her own business. The salon employed twenty-five staff; including one business manager, four team leads, as well as full-time service providers and contractors who leased space. The Salon opened in February 2005 and was working toward profitability based upon its monthly production goals. Because of the tremendous stress of being both a new business owner and the top producing artist in the salon, the owner was looking for a way to develop her management team and increase the monthly production of her staff. The goals of the project, after several revisions, focused on helping the salon refine its vision and improve the decision-making and communication skills within the group. Pre- and post-intervention questionnaire data were analyzed using the Wilcoxin Signed-Ranks test. The results indicated that the project had a positive impact on clarity of vision, decision-making, and communication skills development.

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CHAPTER 1

Introduction

This first chapter provides an introduction and background to my Master's Thesis Field Project. In it I describe the client system with which I completed the project, including its history, staff, and operating environment. I also provide an overview of the project goals and how those goals evolved throughout the project.

The Client System

The client system was a full service salon, spa and lounge called Bright Colored Boutique (BCB). (Names used in this thesis, including BCB, have been changed to ensure confidentiality.) BCB offers complete hair, skin, make-up, body, and nail care. As part of those offerings, there is a Medical Director who offers skin and body care using cosmetic injections that are designed to treat facial wrinkles, improve the signs of aging, enhance facial appearance and treat skin imperfections. The boutique's uniqueness is found in its blend of services, and the strength of its locally and nationally renowned signature "Spotlight service", which is designed to help integrate current styles with individuality. During the Spotlight Session, the customer meets with their choice of 3 artistic experts from the following services: hair, skin, brow design, nail artistry, make-up, wardrobe or body wellness. The goal of the Spotlight Service is to provide a team of artists to champion an individual's road to looking and feeling their best. The Spotlight Service gives customers a better understanding of how to work with their attributes and become more comfortable with themselves, by providing clients concrete counsel on how

to bring out their natural beauty or enhance personal style. Their uniqueness is also reflected in the business's physical space.

BCB marketing literature described it as a place where artists nurture natural beauty, embrace community and uphold independent style. Angelina Fern's, the owner, goal is to create a different than normal kind of customer experience at BCB and to take the beauty industry to a new and higher level of service. She wanted her business to be a dynamic center of creativity that was viewed as a visionary within the marketplace and was constantly striving for newness, change and innovation. In order to accomplish this she brought together a group of people that are exceptionally talented, entrepreneurial, intelligent and creative. By doing this, she believed, they could create something beyond average success and could grow, while not losing the environment in which entrepreneurs can thrive. The end result, she dreamt, could provide customers with a unique experience by offering a full range of services beyond the usual beautician.

The client system consisted of Angelina, the business owner, an individual contributor and the project sponsor, a business manager and roughly twenty-two full-time employees, as well as another five contractors, who rented space. The employees were divided into teams, by the services they provided (See Organization Chart, Appendix A). During the time I was involved with the spa/salon, staffing changed a number of times, including several departures of existing and arrivals of new staff persons.

The spa was located in a downtown section of a large metropolitan city and had a diverse employee body. The majority, twenty-one of twenty-seven, of the employees were Caucasian women, with a few additional differences represented; such as

homosexuals, a hearing impairment and three African Americans. Most of the employees were in their twenties and thirties and had relatively little business experience other than in the service related beauty industry.

Recent History

At the time the project began, BCB was just finishing their first six months as a new business. Prior to opening BCB, Angelina had extensive experience in the beauty profession. She worked for many years for Large Company Salon and Spa, which grew substantially while she was there. It became a large corporate culture and Angelina grew increasingly frustrated by the layers of people between her and her customers that were contributing to creating poor customer experiences. She moved her practice to a smaller independently owned salon five and half years ago, where she could be a part of a boutique business that gave her a great deal of independence. During her time there, Angelina paid little attention to the details of managing a salon as she chose to focus on her clients and her craft.

As Angelina's business and reputation grew she was encouraged by others to consider opening her own spa. She did extensive research and eventually decided to pursue the idea. BCB opened in February, 2005. Angelina found herself struggling with managerial issues that she has not faced before. A large part of her interest and willingness to be a dedicated sponsor in this project was because she wanted to become a better leader.

How I Became Involved

I was introduced to BCB by Roz, who is the business manager of the spa. Roz is a long-time friend of my wife. We had been following the success of Bright Color Boutique's opening through Roz, as we learned more about her role there. I received a

gift card from Roz for my birthday, which allowed me to experience the “Wet Shave” at the spa. My wife and I also attended the grand opening celebration of the spa in an effort to support Roz. Therefore, I had some familiarity with the organization, both on a personal level and through my own customer experience.

However, it was not until I came home from module in June 2005, to find Roz at our house visiting with my wife, that she started asking about my school. We began to discuss the prospects of my working with Angelina and the spa. I explained to Roz what I was looking for in a project and that I was in the process of looking for someone to work with. She said that they had just begun to research consultants for managerial improvement. She was very interested in what I described as the Action Research process and methodology. We agreed that I would send her additional information and that we would follow up to discuss it further.

I sent Roz an introductory letter further describing the Action Research methodology, timeline and requirements of the sponsor of a project. We got together shortly thereafter, she said she had reviewed the materials, researched the Leadership Institute of Seattle (LIOS), and was impressed by the offering. We discussed more of what was needed for a suitable project and what I needed for it to be successful. Roz indicated that she would share all of this with Angelina and set up a meeting for us to discuss it further in person. When I met with Angelina, she agreed to the project.

Development of Project Goals

In my first face-to-face meeting with Angelina, she described her background, her goals for the salon and her struggles as the owner. The main factors troubling her were:

(a) a frustration with her employees, who were not being as financially driven as she was, and (b) difficulty in communicating directly with her team. She described their environment, where long-term survival was the primary goal on a week-to-week basis, given the start-up nature of the company.

At that time, Angelina was the primary revenue producer for the salon therefore she alone was producing the majority of the financial results on which the company depended. This made it difficult for her to also focus on running the business. Therefore she was very concerned about getting others on the team to produce results similar to hers. She believed the way to do that was to personally provide less direct services and be more available as a manager. She wanted the following goals for the project:

Cohesive Team

- Management and staff engage in direct communication
- Staff encourage each other to achieve production goals

Effective Management

- Roles and Responsibilities are clearly defined
- Angelina is authentic with her authority

Production Goals

- Weekly goals are understood and achieved
- Customer satisfaction is high
- Customers receive more than one type of service

These goals evolved over the course of the next several meetings with Angelina, as I asked her to consider the goals she had initially mentioned in terms of three types of

goals, Bottom Line, Work-Process and Human Relations (O'Neill, 2000). Angelina's response (see Appendix B) became the basis of what we next worked with.

Further modification occurred as we continued to learn more about forming effective goals. The next iteration we agreed upon were the following goals, which were then told to the team:

Goal 1 - Improve the role clarity, especially for the team leads and for the senior management within the salon. This was planned to be measured by a Pre- and post-intervention surveys to assess employees' knowledge and clarity of management's roles and goals.

Goal 2 - Improve the clarity of each individual's production goals in the salon, so that everyone is striving to reach their goals in service of the salons financial well being. It was to be measured Pre- and post-intervention measurements of individual's production results.

Goal 3 - Increase the management team's communication abilities, which would be measured by Pre- and post-intervention interviews to collect qualitative feedback on the teams' perception of the management team's communication abilities.

As a result of the data collection, data feedback process, the client system prioritization of the data, and additional meetings with Angelina, the project goals changed yet again. The employees had said the vision for the boutique and the decision methodologies used by senior leaders were not clear to them. They were also frustrated with how certain groups within the boutique communicated with one other. Addressing these concerns, Angelina believed, would help the boutique increase its production, so

the goals were refined and finalized to reflect all concerns more accurately. The finalized goals were:

Goal 1-Increase the connection to and understanding of the salon's Vision.

Goal 2- Increase the overall communication skills of the salon.

Goal 3- Increase the decision making skills of the salon.

All three goals were to be measured by Pre- and post-intervention employee questionnaires.

In this Chapter, I have provided an overview of the project and the client system. Chapter 2 will provide the theoretical foundation for the work done and decisions made on the project.

CHAPTER 2

Literature Review

This chapter focuses on the major theories and methods that informed my work during the thesis project. It is organized into three sections. The first section explores the client system and provides a macro level view of the beauty industry and entrepreneurial leadership and a micro level view of the employees at Brightly Colored Boutique (BCB). The second section, Content, explores the importance of vision, decision making, and communication at the macro level, and the Waterline model and O’Neill’s types of goals at the micro level. The third section, Methodology, covers action research, Block’s stages of Action Research, roles in organizational change at the macro level, and survey feedback, the Awareness Wheel, and Interpersonal Gap models at the micro level.

Client System

Macro Level: Beauty Industry and Entrepreneurial Leadership

Beauty industry. I chose an industry I knew very little about to work with because I wanted to try to increase the likelihood that I would not fall into the trap of being an “expert” consultant with BCB. So when I researched the industry, I was surprised to find out about the amount of growth it is experiencing, which results in a highly competitive market. BCB hoped to capture some of this growth and compete by offering a variety of services to their customers, thus it incorporated the services of a salon and a spa.

In a Tribune Business News article by Fran Daniel, published May 21, 2006, he offered the following statistics regarding the beauty industry:

- 230,000 companies make up the overall salon industry, including hair salons, barbershops, nail, and skin-care salons.
- Focus only on hair salons and the number falls to about 165,000.
Independents make up the bulk of hair salons, about 80,000 to 90,000.
- Salon hair care generated about \$2.4 billion in 2005, compared with \$2.1 billion in 2000.
- The industry had double-digit growth in the 1980s, slowed to between 5 percent and 7 percent in the 1990s and is now at about 3 percent.

The \$6 billion nail salon industry has also grown dramatically in recent years. The growing popularity of the spas in New York City can be seen from the number of aesthetician licenses granted to city residents, which has increased 75% from 2001 to 2004. And in California the number of licensed nail technicians has nearly doubled in the past 15 years, to more than 82,000. (Salons a headache for retailers, 2005)

Locally, in The NWSource.com guide, (The Seattle Times Company, 2005) they wrote of the best spas and beauty salons in the Seattle area. It listed over 70 competitors to BCB. Just in the immediate vicinity, I noticed five different competitors within a two block radius of BCB. Upon closer review of their services, it was apparent all were trying to capture the growth in that market.

The spa industry is also faring well. According to the 2002 Spa Industry Study published by the International Spa Association, the industry grew 114 percent between 2000 and 2002, while the number of spa visits grew 71 percent between 1999 and 2001. The U.S. spa industry totalled nearly \$11 billion in revenues in 2001 with a little more than half of that being generated by treatment rooms in destination spas. The generators

of a significant portion of the remaining revenue came from the more than 106 million visits to day spas in 2001 that offered massage and hydrotherapy services and sold retail products (Sandlin, 2005 p.2).

Beyond the more traditional beauty (hair and nail) and spa services, BCB's Medispa also offered laser hair removal, permanent hair reduction, Botox injections, and employed Lisa, the dedicated medical director, to oversee all of these Medispa services. The Medispa therefore added complexity beyond the usual BCB services to Angelina's management responsibilities, due to the regulations, financial costs and the relationship with the medical director.

Medispas, in particular laser, light, radio frequency, and plasma devices (hereafter LLRP devices), have specific state laws overseeing them. The Washington Administration Code, (WAC) 246-919-605 states that the Food and Drug Administration classifies LLRP as prescription devices and that the use of an LLRP device is the practice of medicine under the Revised Code of Washington (RCW) 18.71.011. The state code goes on to outline specific physician responsibilities for use, patient care and processes and delegation of LLRP treatments. The use of or the delegation of the use of, an LLRP device by a physician assistant is covered by WAC 246-918-125. The Washington Medical Board specified similar requirements for injectables, such as Botox or Restalyne, by stating that cosmetic procedures are considered medical treatments if they penetrate the deeper levels of the skin (Sappenfield, no date provided).

The complexity that the Medispa added to the operation, led me to look more closely at the impact it was having on the salon. The Medispa regulations, treatments and machinery created a challenge in terms of how to make the most of the services and

promote them with their clients for all of the staff at BCB. This led to frustrations at times for Lisa, Angelina and the team, as everyone wanted the Medispa to succeed given the financial commitment necessary in order to offer those services.

Entrepreneurial Leadership. I had previously worked at a start-up business the likes of BCB where I learned to appreciate the importance of leader's role; I was therefore interested to explore what influence an entrepreneur's leadership had on his or her organization.

The literature told me that entrepreneurs are deemed to possess particular attributes that include a willingness to take calculated risks, a propensity to innovate, and a determination to succeed in the face of what often appear to be insurmountable odds (Bell, Callaghan, Demick, and Scharf, 2004). It also stated that the critical leadership quality for entrepreneurs is their ability to motivate others (Eggers and Smilor, 1996). I used this information to coach and guide my interactions with Angelina, specifically as I was forming a relationship with her and observing her leadership characteristics. She appeared to motivate her staff by example; working hard to build up her client base, making sure the clients were happy with her service, so that they continued to come back.

Another study, by Jensen and Luthans (2006) on the relationship between entrepreneurs' psychological capital and authentic leadership stated that positive psychological capital, or "who you are" (Luthans and Youssef, 2004), is proposed to provide leverage and competitive advantage, distinct from that afforded by human capital (i.e., "what you know"; see O'Leary et al., 2002) and social capital (i.e., "who you know"; see Adler and Kwon, 2002). The constructs of optimism, resiliency, and hope were used in the study by Jensen and Luthans to represent positive psychological capital, which are

critical attributes in an entrepreneur. The results suggest a positive relationship between entrepreneurs' positive psychological capital and their self-perception of authentic leadership. Entrepreneurs reported levels of optimism, resiliency, and hope. Each demonstrated a significant positive relationship with the perception of their authentic leadership (Jensen and Luthans, 2006). I looked for demonstrations of these relationships throughout the project as Angelina worked to develop her authentic leadership style.

The literature also suggested that owner/managers' personalities, in particular their values and goals, are indistinguishable from the goals of their business (Bamberger, 1983; O'Farrell and Hitchins, 1988). As well, owner/manager's personal values and resources (expertise) influence the strategies and in turn, the cultures they adopt in operating their businesses and, ultimately, the performance of their businesses (Thompson & Strickland, 1986). All of these points were confirmed by what I saw in Angelina. She was not only the leader of the salon, but also the number one producer. The drive and commitment to results she demonstrated was what she wanted the culture to be and her employees to replicate.

Miller and Toulouse (1986) stated that management has the greatest influence in dynamic, unpredictable, and changing environments or in small businesses. Particularly in small businesses, the need for change and action gives managers an opportunity to leave their personal imprint on the enterprise. Bamberger (1983) goes further by stating that business strategies are products of managers' visions and values which in turn originate from their personalities. Miller (1983) noted that managers have greater influence on business strategy in small firms, where the manager is also the owner of the firm. He explained that owner/managers are powerful enough to override obstacles to the

successful realization of their business strategies. They have enormous impact on their enterprises through their power of ownership and face-to-face contact with employees (Miller & Toulouse, 1986). The owner/manager is thus at the center of all enterprise behavior and at the center of the owner/manager are his or her values (Covin, 1991). Values are deeply rooted standards that strongly influence nearly every aspect of life including organizational behavior (Paige and Emery, 2005).

The literature concerning how owner/manager personalities' and values influenced an entrepreneurial culture, impacted how I approached coaching Angelina. I continually reminded her that she was the face of the organization to the employees and customers. Therefore I thought it was critical for her to appreciate and understand the impact of what she did and how she did it, in terms of how her customers and more importantly her team reacted. This concept was quite clear with Angelina's frustration with the employees work ethic in relation to production goals. She was very goal and achievement oriented, which helped contribute to her previous success as an individual producer, but not everyone else at the salon was like that. As soon as Angelina reinforced this goal and achievement oriented behavior with her employees in salon, the values of others soon followed hers. The research and my experience at BCB reconfirmed my prior belief about the importance and potential influence of an owner and leader in an entrepreneurial organization.

It has also been said that entrepreneurship is the most important act in challenging existing products and market relationships (Schumpeter, 1934). The organizations that desire to be highly entrepreneurial must develop an entrepreneurial culture that includes the ability to learn and to focus on markets. Miles and Snow (1978) called those types of

organizations "Prospectors." Prospectors must maintain a reputation as an introducer of new product and market: they regularly experiment with new responses to their market. BCB was doing this with their style and variety of services offered in order to distinguish themselves from all the other salons in town. I struggled with how to apply this "prospector" theory to my work with BCB, specifically with how to intervene in a way that would be noticeably different to this collection of innovators and artists, but would still help them achieve their goals. I will discuss this further in chapter 3.

Micro-Level: Women Leadership, New Leaders and Generational Differences

Women Leadership. Sally Helgesen's book, *The Female Advantage, Women's Way of Leadership*, celebrates the difference between leadership approaches taken by men and its influence from military and participating in team sports, to styles used by women, as they emerged as leaders. Her study of four women leaders in the eighties is contrasted to a study published by Mintzberg in 1973 on how men lead. Helgesen describes the differences between women and men and states that motherhood teaches management, negotiating skills, and the ability to balance. The result is that women focus on process and men focus on achievement and closure. Women are more flexible, can complete diverse tasks, and value cooperation and relationships. Angelina was a mother and demonstrated many of the behaviors Helgesen said women learn with mothering. Her research also helped me to recognize Angelina's female and male leadership characteristics.

Helgesen goes into more detail on the leadership structure used by men, military, and sport teams as hierarchy. This system follows a chain of command; information is filtered, gathered and sorted as it goes to the top through appropriate channels.

According to the one of the four leaders studied in the book, who describes her leadership style as circular and coming from the middle not the top, the female leadership attributes are a web structure with facilitated direct communication. The emphasis is on using language, which avoids business jargon, as the greatest motivating voice in order to show caring respect, appreciation and patience.

Another leader profiled in Helgesen's book describes breaking down the barriers to move from a hierarchal to a web structure, while a third leader describes herself as a transmitter of information.

The challenge for Angelina at BCB was that she wanted to lead like Helgesen described in the leaders cited, but she was so busy producing, that it was difficult for her to transmit information as a leader.

These theories influenced my work by forcing me to look at how I might perceive and value leadership qualities differently than Angelina because of our gender differences. The theories also gave me more context for the on-going dilemma Angelina faced of the need to produce versus the desire to lead and why her predominantly female staff was becoming more and more frustrated by a lack of information.

New Leaders. Since Angelina was new to the role of leadership/ownership, I turned to Linda Hill's book, *Becoming a Manager: How New Managers Master the Challenges of Leadership*, in order to get indications of how I might be most helpful in coaching her. The book discussed why learning to manage is so hard, especially for successful individual contributors. In their prior jobs, success depended primarily on their personal expertise and actions. As managers, they are responsible for setting and implementing an agenda for a whole group, something for which their careers as

individual performers haven't prepared them. This managerial task is made even harder because of common misconceptions about what it means to be the boss. New managers think they can wield their new authority to get things done and control their employees, when in fact they are dependent on others to help them achieve what they need. Compliance from their employees, because of their authority, does not guarantee commitment. Commitment to the leader has to be earned by the new leader demonstrating her character, competence and influence. New managers also tend to assume that they need to build relationships with individual subordinates rather than create a team culture that will allow the group to fulfill its potential. Finally the new manager focuses on making sure the operation runs smoothly, instead of initiating changes that enhance the group's performance (Hill, 2003). These ideas enabled me to know what to coach Angelina and Roz about, by being aware of and attending to the ways in which leadership was performed by each of them.

Generational Differences. With a gap in ages of employees and a new foundering team, I turned to understanding what theories existed about generational differences in the workplace for ideas about where to intervene with the team's functioning. Lancaster and Stillman (2002) purport that each generation is shaped by the period in which they came of age. The events and conditions during one's early years uniquely shape the values and behaviors of the generation. These differences have significant effects on workplace relations, especially if there is a large generational gap between employees. They define the four different generations in the workplace today as (a) Traditionalists (born 1900–1945), (b) Baby Boomers (born 1946–1964), (c) Generation XERS (born 1965–1980), and (d) the Millennial Generation (born 1981–1999).

Traditionalists are typically loyal and believe that institutions have the capacity to accomplish great things. They tend to respect authority and are comfortable in a top-down hierarchy. Baby Boomers are marked by their optimism, competitiveness, and the strong desire to challenge the status quo. Generation Xers by contrast are considered skeptical, resourceful, independent, and typically more concerned with work-life balance than Boomers. Finally, the Millennials, known alternately as Generation Y (and sometimes *why*), are tech-savvy, used to customizing everything and expect positive feedback from their supervisors and bosses (Lancaster & Stillman). Understanding these basic differences between various members of the BCB staff helped to explain why there were such divergent management expectations and resulting disagreements. Although the group was primarily generation Xers and millennials, Angelina and her newly assigned team leads were baby boomers. The team leaders talked a lot about needing to babysit their team members, which led me to try and highlight these differences whenever I could, so that the leaders could approach their teammates more informed. I also chose to focus part of the intervention on communication styles in order to have the team learn to match another's preferred style and therefore be better communicators. This focus was chosen in order to acknowledge the differences in the group, rather than getting frustrated by them. I will discuss this further later in this chapter.

Content

The final project goals focused on increasing the connection to and understanding of the salon's vision, and increasing the overall decision-making and communication skills of the salon. This section describes the theories which supported the update from the original production oriented goals to the final goals.

Macro-Level: Importance of Vision, Decision-Making and Communication

Importance of Vision. Burt Nanus, in his book *Visionary Leadership*, defined vision as “quite simply, a realistic, credible, attractive future for your organization.” He admits that it “is only an idea or image of a more desirable future for an organization, but the right vision is an idea so energizing that it in effect jump-starts the future by calling forth the skills, talents and resources to make it happen (Nanus, 1992 p. 8). In the data feedback meeting, it became apparent that most team members didn’t understand the vision for BCB. Angelina admitted to having a vision when she started the salon, but now that there were twenty or more people looking to her, she had a hard time articulating it for them. I knew from having read Nanus’s theories on the importance of vision and hearing Angelina’s statement, that here was an opportunity for the salon and spa to clarify their vision. Therefore I did further research on visioning.

Collins and Porras, in their book *Built to Last*, defined visionary companies as those that excel at “preserving their core and stimulating progress” continuously. They say that “vision simply provides the guiding context for bringing this dynamic to life” (Collins and Porras, 1997, p. 238). That was what BCB needed. Developing a vision would allow the team to create a mental model that they could bring into being over time through their commitment and actions, which is part of a vision’s usefulness and power (Nanus, 1992). Powerful and transforming visions have special properties that help companies set standards of excellence, clarify purpose and direction, inspire enthusiasm, encourage commitment and reflect the uniqueness of the organization. It was apparent to me that a strong vision for BCB would be critical for the team to rally around as they continued to define themselves as a new organization. Developing a vision collectively

would also provide them the opportunity to implement it together rather than simply have Angelina set a vision for the salon. I saw this as critical because as Bennis and Nanus said, “if the organization is to be successful, the image must grow out of the needs of the entire organization and must be ‘claimed’ or ‘owned’ by all the important actors” (1985, p. 109).

Decision-Making. Robert Crosby (1992) identified 25 factors that contribute to the creation of an empowered and high-performing organization (See Appendix C). When these factors are attended to, productivity and quality are high, absenteeism is low, accidents are reduced, and employees are more likely both to enjoy and be motivated in their work environment. The 25 high-performance factors are influenced by the manager of the work team and the manager must have enough authority to create a participative culture and a loyalty that motivates followers. One of these factors was the ability to distinguish between decision making and influence. The inability to make this distinction is the dominant cause of mistrust and low productivity. The manager and the group members must understand the different decision-making and influence styles and know which ones they employ.

I used these ideas to evaluate the effectiveness of Angelina and the team’s decision making skills. They allowed me to recognize several instances where the team became bogged down in inefficient decision making processes. When I pointed this out to Angelina after the first team meeting, she admitted to disliking the decision process. As a result, I wanted to become more knowledgeable about decision making.

Johnson and Johnson (2003) described different styles of decision making: autocratic, consultative, consensus, majority vote, and delegative (See Appendix D).

Each style has advantages and disadvantages, requiring different amounts of time, which needs to be considered when determining which style is the most appropriate to use. The more people who are involved in decision making, the longer it will take to reach a decision. However, the advantages of including more people are two-fold, a) the quality of the decision increases by fully utilizing the resources of each member, and b) the members' commitment to implement the decision increases by involving them in the process.

Angelina struggled with making autocratic decisions, soliciting feedback from her team, and clarifying the type of decision style she was using. The result was that decisions were not effectively made. Most of BCB's decisions did not meet Johnson and Johnson's (2003) five characteristics of effective group decisions, because they did not fully utilize the resources of the group members, use time efficiently, or create correct and high quality decisions that were subsequently fully implemented by all required group members (p. 268-269). Sometimes decisions never got made at BCB, which is the antithesis to another one of Crosby's 25 high performance factors. Crosby stated that taking too much time to make a decision is as bad as not taking enough time or not making a decision at all (1992). Angelina was aware of the impact this inability to make quality decisions was having on her team, and she wanted to work on her own and the team's ability to make more effective decisions. These theories were used to design the experiential intervention, which helped the team distinguish between and evaluate the various decision-making methods.

Communication. Since there were a good number of differences among the employees, I explored the impact of social styles in organizations and how understanding

the differences in them can lead to more effective communication and ultimately more productive organizations. I hoped that this would lead me to a way of assisting with the ineffective conversations between employees and Angelina I so frequently witnessed and heard others mention.

It is by now axiomatic that effective communication is an essential component of effective management, leadership, and group functioning. The search for ways to understand complex communication behavior, however, is an evolving process. One mechanism for understanding communication behavior has been the notion of style. A number of models of style have been proposed and all have the common notion that some pattern of human behavior can be observed by others and will have some impact on an individual's success in interpersonal communication, organizational leadership, management and other interpersonal endeavors.

Over the past thirty years, social style (Buchholz, 1976; Buchholz, Lashbrook, & Wenburg, 1976; Merrill & Reid, 1981) has been used extensively to train managers and sales personnel to increase behavioral versatility through role shifting. Ultimately this model teaches participants how to alter their communication strategies to adapt to the styles of others. The result of learning such strategies appears to be positive. Prince (1991) reported that "both formal and informal assessments have found that more productive and satisfying work relationships have resulted from the (social style) training" (p. 66). Social style theory impacted my conversations with Angelina and her team and was a foundation for the intervention on communication.

The social style model was also developed as a two-dimensional matrix descriptive of human interactive behavior. V. J. Lashbrook and W.B. Lashbrook (1980)

and Snavely and Walters (1983) reported four underlying assumptions about human behavior that frame the concept of social style:

1. Humans develop relatively stable behavior patterns.
2. Humans form immediate impressions of others based on verbal and nonverbal behavior.
3. The way individuals behave toward one another is largely determined by their perceptions of each other.
4. The most prevalent and probably the most important perceptual dimensions are assertiveness and responsiveness. (Snavely & Walters, 1983, p. 122)

A social style matrix is created by the combinations of the communication behavior dimensions of assertiveness and emotiveness in a two by two matrix resulting in four distinct styles. Those low in assertiveness and emotiveness are termed analyticals; those low in assertiveness and high in emotiveness are termed amiables; those high in assertiveness and low in emotiveness are termed drivers; and those high in both dimensions are termed expressive (See Appendix E).

May and Gueldenzoph (2006) examined how persons of the same or different social styles worked together in groups. They found that group members rated others of the same style higher than they did those with any other social style. Those with opposite styles were not rated differently than were those with adjacent styles.

I found the research on social style to reinforce my belief that people like, and therefore prefer to work with, people that are like themselves. I used these theories to design part of the communication intervention, because they informed my thinking about how to build on the people's differences as a strength that could differentiate them from

all the other salons. The salon employees were just about evenly distributed between the four different communication styles and this diversity often created a sense of frustration for Angelina and the employees rather than an opportunity to use their differences productively. They were unable to match and mirror each other, in order to develop a greater sense of common interests and understanding.

Creating a shared “map” of reality enables individuals, through their communication, to move from agreement to agreement, rather than trying to struggle from disagreement to agreement (Zolno, 2005). Angelina and I saw communication as the glue that would hold the BCB team together and allow them to embrace rather than avoid conflict, process decisions effectively and ultimately achieve their desired business results.

Micro-level: Waterline Model and O’Neill’s types of goals

Waterline Model. I used the Waterline Model (Harrison, 1970) (See Appendix F) to help the client define goals of the project and to determine my strategies for an intervention. The model describes the task as above the waterline. Below the waterline, is the maintenance work. In cases where groups are stuck or not accomplishing goals, they need to check below the waterline for factors that may contribute to the group’s inability to meet those goals.

Harrison described four levels of intervention below the waterline: (a) roles and goals, (b) group process, (c) interpersonal, and (d) intrapersonal. He theorized that it is easier to intervene on levels of structure and process within an organization; contending that consultants need to function at the level of the client’s felt needs, rather than at the deeper levels the consultants believe would be most fruitful. When a consultant tries to

intervene at levels deeper than what the client system's norms will comfortably allow, he or she runs the risk of being tolerated, deceived or simply fired. If the focus of the intervention can be shifted to a more modest depth (e.g., decision making, role clarification, or information sharing), the change can be more easily communicated, and the client will often feel more ownership for the change process and be more confident of their ability to sustain the change after the consultant has left (Harrison). Often times, if the consultant intervenes at an upper level of structure or process, the effects will cascade down into the lower levels of interpersonal or intrapersonal.

This understanding helped me shift the focus of conversations I had with Angelina away from her focus on the problems with a specific employee, the lowest level of maintenance, to emphasizing the higher level issues like those that could ultimately improve those individual issues.

O'Neill's types of goals. To help BCB set their goals, I used O'Neill's (2000) method of setting three types of goals: Bottom-Line, Work Process, and HR Goals. This framework provided me structure for the goal setting process and helped Angelina combine her desire for improved productivity and profitability for salon, while also focusing on the health of the team and her leadership skills. We used these categories to develop goals and measures that were SMART – specific, measurable, attainable, results based, and time-based (Conzemius & O'Neill, 2006). Katzenbach and Smith (2004) said, “Without specific measures of performance goals, team members pull apart, become confused and revert to mediocre performance” (p. 7). Setting specific and measurable performance goals (a) allows teams to achieve small wins; (b) helps maintain the teams focus on getting results; (c) facilitates clear communication and constructive feedback

within the team; and (d) encourages goals that can be compelling, symbolize accomplishment, and can motivate and energize (Katzenbach & Smith, 2004). The goal research helped ground the project for both Angelina and me. She was very goal oriented, so it was critical for her that there were specific goals that we could track to. Also having this knowledge on goals guided me to help her to more successfully articulate the importance of goals to her team, who resisted specific goals.

Methodology

Macro-Level: Action Research, Block's Five Phases of Consulting, Roles in Organizational Change

Action Research, Block's Five Phases of Consulting. The primary methodology I used in this project blended Kurt Lewin's (1946) Action Research with Peter Block's (2000) five phases of consulting. "Action research is a comparative research on the conditions and effects of various forms of social action and research leading to social action. The process uses a spiral of steps, each of which is composed of a circle of planning, action, and fact-finding about the result of the action" (Lewin, 1946 pp.34-46).

Action Research provided me with a structure that promoted collaboration, systemic thinking, and active participation. The acting-observing sequence, which involves collecting data, providing the data back to the organization, and then taking an action based on the findings, provides rapid and measurable feedback on the impact of interventions in the system (French & Bell, 1999).

Lewin suggested a four-phase cyclical process that included: (a) planning, (b) acting, (c) observing, and (d) reflecting. Block described five integrated phases of a consulting engagement. They are: (a) Entry and Contracting, (b) Discovery and Dialogue, (c)

Feedback and the Decision to Act, (d) Engagement and Implementation, and (e) Extension, Recycle, or Termination. These five phases have been slightly modified to form the six phases of the Leadership Institute of Seattle's (LIOS, 2005) consulting process: (a) Entry and Contracting, (b) Data Gathering and Analysis, (c) Data Feedback and Joint Diagnosis, (d) Joint Goal Setting and Planning, (e) Intervention/Change Implementation, and (f) Evaluation of Goal Attainment and Project Completion. It is this structure that I used as the project methodology.

Roles in Organizational Change. Daryl Conner's (1992) change model, SATA; Sponsor, Agent, Target, Advocate, informed my understanding of our roles during the project. Conner defined sponsors (individual or groups with the authority to make change happen), agents (individuals or groups with the responsibility for diagnosing and planning for execution of the strategy), targets (those who must actually change), and advocates (individuals or group that want to see the change happen but do not have the requisite authority to see that it does). Conner's model dictates that a successful organizational change project requires clear definition of roles and responsibilities, and that those roles and responsibilities are managed proactively and effectively.

I used Conner's model to help determine roles during the entry and contracting phase of the project. At BCB, Angelina was the project sponsor, and the business owner who oversaw the salon's performance. I functioned in the role of change agent. In addition, to the extent that I assisted Angelina and Roz through coaching on the impacts of their management styles, I assumed the role of change advocate. Targets for the project included not only all of the staff and the team leads, but Angelina and Roz as well, due to their willingness to be coached. Several of the staff took on the role of change advocates

throughout the course of the project, encouraging their own, as well as other's change efforts.

Conner (1992) says "Without appropriate sponsor's attention, energy, action, and other resources, a major change will remain in the advocacy state or falter after it is announced" (p. 113). Having strong and effective sponsorship is an essential part of a successful change effort. I used this knowledge to both coach and evaluate Angelina as a sponsor. As a result, she was a consistently a strong sponsor. She had the power to legitimize change at the salon, was feeling significant pain around the problems they were experiencing and had the sensitivity and persistence that Conner indicates is critical to creating sustainable change.

Micro-level: Survey Feedback, Awareness Wheel, Interpersonal Gap

Survey feedback. Through survey feedback methodology, I administered surveys to collect team members' opinions about the salon, shared survey results with all the members of the salon, and conducting meetings, attended by all members of the salon where they were encouraged to discuss issues identified in the survey (Thompson & Aplin, 2004). Using this method made the individual interviews more similar to start with, as all of the participants had completed the same survey prior to the interview. The surveys made the presentation of the data easier and more credible because it resulted in information that was more likely to be seen by the client as relevant, concrete and specific (Thompson & Aplin).

Awareness Wheel. The Awareness Wheel (Miller & Miller, 1997) postulates that there are five key pieces of information that are present in any given relationship exchange: (a) sensations, (b) thoughts, (c) feelings, (d) wants, and (e) actions. Each of

these elements is separate from the others, yet they all work together. The value in using the Awareness Wheel is in separating out and becoming clear on what one senses, thinks, feels, wants, and does in a human interaction as a means to enhance communication and understanding. The authors suggested that by using “I” statements with these terms, an individual is able to speak clearly and concretely about one’s experience. I introduced the Awareness Wheel to BCB during the intervention meeting to help the staff become more skilled in their communication, especially during times of conflict.

Interpersonal Gap. The Interpersonal Gap (Wallen, 1968) describes the difference that can occur between what one *intends* and the *impact* of actions or words on another. Intentions are defined as the “wishes, wants, hopes, desires, fears” that give rise to a person’s actions or speech. Impact refers to “a person’s inner response to the actions of another” (Wallen, 1968). Each person in a human interaction has their words or actions *coded* by their inner state, and they similarly *decode* the other’s words or actions. When, as a result of this coding/decoding process, what one intends is not the same as the effect one has, an interpersonal gap has been created. Enhanced communication, where the sender states the intention and the receiver states the effect of the communication efforts, is needed to bridge this gap.

The Interpersonal Gap helped BCB, and specifically Angelina, understand ways in which to communicate more effectively. For example, I pointed out an example of the importance of impact versus intent, with Angelina’s request for feedback on her decisions. I am looking for your input on an open decision is different from what she often intended, I want to make sure you are ok with the decision I have already made. This simple point made important clarity for the team.

In this chapter I described the theories informing my project. In Chapter 3, I will tell the story of the project, describing the events, and pinpointing the critical incidents that shaped my interventions.

CHAPTER 3

Intervention

In this chapter, I describe the project events in detail, including background, meetings, critical events, and interventions. These events are presented in chronological order, utilizing French & Bell's (1999) Action Research project phases.

Project Timeline

The project work began in August of 2005 and concluded in March of 2006; involving 55 hours of work, which was 13 more hours than I estimated it would take me in the Proposal stage of the project (see Appendix G). The areas in which my projections were significantly off were Data collection, which took 8 ½ more hours than I had estimated and the intervention, which I estimated would take 8 hours and took 18 ½ hours. I spent 2 hours less on evaluation and 3 ½ hours less on problem solving than I had anticipated I would.

Entry and Contracting

The development of this project began in June of 2005, when I came home from the final module of my first year at LIOS and found Roz there. I told her that I was looking for a client for my Coaching and Consulting Organizations thesis project. Roz explained that after the first six months of operation, it had become apparent to her and Angelina that there were significant organizational issues that could use better management. As both were new managers, they were interested in obtaining assistance and new skills from an outside management consultant, which she had begun to look for.

Following up on our conversation, I sent Roz two documents: the Action-Research Project Defined (see Appendix H) and the Letter of Introduction (see Appendix I). We then agreed to meet on July 15 at the boutique.

During the meeting at Brightly Colored Boutique (BCB), I got a sense of the business. The boutique is a very open environment, which makes meetings and conversations difficult, given the music and interruptions due to staff and client movement. Roz and I discussed a number of things; a) a proposed timeline, b) what I would need in terms of commitment from her, specifically establishing Angelina as the project sponsor and c) payment for my services. Payment was a sensitive issue given the boutique's tenuous start up financial status, so I spoke of the importance of payment in terms of their commitment to the project and discussed my rate versus the current market rate. At the conclusion of our meeting, Roz agreed to follow up with Angelina.

My initial contact with Angelina Fern occurred at a coffee shop on August 10, 2005. We compared our backgrounds, discussed Angelina's vision for BCB, her goals, and the organization of her team. I judged Angelina to be a driven professional with high expectations of herself and her employees. The majority of the business goals she wanted to accomplish were specific and related to the amount of business she and her colleagues could produce at BCB.

I explained the Action Research process and asked what fears she might have about doing this kind of work. She was very positive about the process, but expressed concerns regarding what her employees might think of my questioning them, what things her employees might say or think about her and the salon, and what she might discover about

herself and have to work on. We determined the best way to operate together and set our next meeting for August 22, at the boutique.

I began the meeting with introducing to her the time commitment I thought we would need in order to do the project. She was concerned about the length of time needed, given that it was not time that would produce revenue. We therefore agreed to try and wrap up the project by the end of January.

Since I was not confident as a practitioner, I was concerned about how well I would “produce” for Angelina, therefore making the discussion of payment difficult for me. The difficulty was accentuated by Angelina’s constant focus on business metrics, such as daily output of services and cash flow, reminding me of how important every dollar was to her. She was looking to me and this project to help her instill this financial focus and drive into her employees. Never the less, we discussed how my compensation rate of \$50 an hour for the 40 hours was considerably lower than the market rate of \$100. Angelina explained that she was wary of paying even that much since she believed I had talked to Roz previously about \$800 for 40 hours. I explained that compensation was important to ensure that the project was taken seriously by both parties and that my time and knowledge were valuable. We settled at \$1,000 for the 40 hours, to be paid in quarterly instalments on the 20th of each month, starting in October.

We both agreed that confidentiality was critical to the success of project. The issue of confidentiality would come up throughout this project and was at the center of one of the critical incidents of the project that I will discuss later.

Angelina also wanted to assure that everyone understood her motivation for engaging me on this project, which she expressed as: “learning more about myself as a leader in order to make the boutique as successful as possible.”

We then addressed next steps. Since the quarterly company meeting was the following week, we decided that it would be a great opportunity for me to be introduced to everyone and to observe the team. We planned Angelina’s introduction of me, as I coached her through what would be most effective to say.

The meeting concluded with Angelina signing the Thesis Project Release of Liability and giving feedback to one another. I suggested that we close all our meetings in the last five minutes with feedback, which Angelina agreed to do.

Goal Formation

During these initial meetings, Angelina described the outcomes that she wanted from the project; a cohesive team, one in which the management and staff engage in direct communication and the staff encourages each other to achieve production goals. She wanted to practice effective management by clearly defining roles and responsibilities, and expressing authenticity in her authority. Most critical to Angelina was the creation, understanding and achievement of weekly production goals that included high customer satisfaction, and customers receiving more than one type of service.

I thought these could be the project goals until I discussed them with my adjunct faculty, Bev Behrman. They could not be easily measured and the scope of these goals was too much to be able to accomplish in a 40-hour project. Therefore, I asked Angelina to decide what she wanted to change at BCB, and suggested that she consider that change within three types of goals: Bottom Line, Work-Process, and Human Relations, assuming

that would help her to get to more workable goals for the project. She concluded that Business and Bottom Line Goals were: (a) Current Goals are \$30,000 weekly and \$125,000 monthly, (b) Targeted goals are \$75,000 weekly and \$312,500 monthly, 2 ½ times improvement. This level of production will get her to her previous earning potential and raise other key employees' income. (c) MediSpa is only booking at 10% of their potential, need to increase overall productivity. (d) Hair department to improve production by 50%. (e) Skin care department to improve production by 50%, outside of Angela's production and (f) Double current product sales.

The Work-Process Goals represented specific work behaviors that were not currently happening that Angelina felt were necessary to drive business and contribute to the bottom line business goals: (a) Increase number of Pre-booking by clients for their next appointment, (b) increase sales of product to customers, (c) increase the number of customers educated on, trying or buying other services in the spa, (d) send thank you cards to all new customers thanking them for their business, and (e) make all clients aware of BCB's party capability.

Human Relations Goals or how team members relate to each other and work more effectively, would be: (a) Improve Angelina's ability to work effectively with her Team Leaders to define their roles and goals, (b) improve Team Leaders effectiveness in establishing, monitoring and inspiring departmental goals, (c) improve Individual Staff's understanding of their roles and goals and (d) understand how these Human Relations goals contribute to the departmental and overall business goals.

At our next meeting, Angelina and I agreed that my role was to assist her and BCB to achieve their overarching production goals. The goals that had been decided

upon at the last meeting were then further refined and finalized as the project goals which would be presented to the team.

Goal 1. Improve the role clarity, especially for the team leads and for the senior management within the salon. This would be measured by a pre- and post-intervention survey to assess employees' knowledge and clarity of management's roles and goals.

Goal 2. Improve the clarity of each individual's production goals in the salon, so that everyone is striving to reach their goals in service of the salons financial well being, which would be measured with pre- and post-intervention measurements of individual's production results.

Goal 3. Increase the management team's communication abilities. This, too, would be measured by pre- and post-intervention interviews to collect qualitative feedback on the teams' perception of the management team's communication abilities.

Data Gathering

Having finalized the project goals, Angelina and I then planned the interviews. We agreed that individual, as opposed to group; interviews would encourage more frankness. Since there were seventeen people to interview, the interviews had to be short, thirty minutes, in order to get them all done and stay within the forty hour time frame. I developed the following interview questions, and shared them with Angelina.

1. What is your role at the boutique?
2. What is working well and what is not?
3. What are the strengths and weaknesses of your department?

4. If you had a magic wand to fix three issues, what would they be and why?

I never got to ask the last two questions in the thirty minute interviews as the discussions regarding the first two questions took up all of the time.

We also decided to use a data gathering survey, in addition to the individual interviews (see Appendix J). This survey was completed by all the employees that I interviewed and given to me by each individual prior to their interview. The survey explored goals, (individual, department and boutique), roles and overall behaviors.

The time slots, locations and people continually changed for the scheduled interviews. Their lack of commitment to showing up for the interviews was extremely challenging and reinforced how Angelina had explained the staff. They were, however, very forth coming, once they finally arrived, after I reassured each one about confidentiality.

Data Analysis

Beyond determining the averages for the answers to the survey (see Appendix K), analysing the data was challenging for me. I struggled to distil the large amount of data into themes. I thought I had to consolidate the themes to as few as possible and I didn't know whether to use direct quotes from the interviews (see Appendix L). I decided to put the data into fourteen themes, (see Appendix M), and not use any quotes from the interviews, as I did not want Angelina or the employees trying to figure out who had said the quote and therefore potentially risking someone's confidentiality. The fourteen themes were: (a) personnel, (b) decision making, (c) posting of goals, (d) recognition and celebration, (e) lack of faith in the ability of Roz to relate to the industry, (f) lack of access to Angelina when it is needed, (g) lack of knowledge of how to use Kira, (h) lack

of consistency in how department leads are used, (i) us versus them, (j) quid pro quo, (k) the overall environment, (l) work schedules, (m) music choice and (n) finally the future of the salon.

Data Feedback with Sponsor

After analyzing the data, I met with Angelina to show her the results, so there were no surprises for her at the feedback meeting. Prior to the meeting, I was concerned about how Angelina would receive the negative information that was said about her in the interviews. My concern was unnecessary, as she received the information well and, in fact, reported that she was not really surprised by anything. She was not shaken by the negative comments about the boutique and her leadership. She was very self-aware and open.

At this meeting about the data analysis, Angelina also informed me of significant changes at the boutique. Paul, the lead makeup artist, was let go, due to what she called a major blowout. She explained that he had anger management issues that were borderline violent and created safety concerns. My experience of Paul had been much different, but it sounded as though the decision had been made and it was not a big issue for Angelina or the team, so I said nothing in response to hearing this news.

The second change was Angela's intention to let Kira go, which came as quite a shock to me. Kira was Angelina's executive assistant and helped Roz with marketing. She was also my primary contact during the project, in terms of administration, scheduling the meetings and interviews. More importantly I knew that she was seen by others as a positive influence within the team. However, no one knew exactly what her

role was and how to make the best use of her, Angelina told me in our discussion of the theme “lack of knowledge of how to use Kira”.

Angela thought that her decision to let Kira go rendered the theme about Kira as no longer an issue. I shared with her my concerns over the timing and possible implications of this decision. The team could see the firing of Kira as a result of the data gathering process because they said that they were not sure how to use Kira or what she did in the survey and interviews. The potential correlation was too strong. If the team interpreted the termination as linked to the Action Research process, they might not feel safe speaking honestly going forward in the project. My concerns did not affect Angelina’s decision. She was going to have a team meeting to discuss the firing and let everyone know her reasoning. I pointed out what looked like a pattern to me. Angelina was fixing problems within the boutique by “letting go” of any employees that were causing issues. She heard me, but, assured me it was pretty common in the industry to have a fair amount of turnover. I do not know if this was her way of resisting or denying my feedback, but I wish I had pursued it further with her, as I knew her goal for BCB was to be different than all the other salons out there that have high turnover.

Team dynamics and stages of development were the next topics Angelina and I covered. She told me she had just finished Patrick M. Lencioni’s *Five Dysfunctions of a Team* and that she believed that the core issue at the boutique was teamwork, the lack of trust and conflict in team. I explained to her that trust takes time to develop and with the continual coming and going of people, it makes it that much harder to accomplish. I noted how excited she was to get right into solving the problems with the concepts from the book. I also realized how easily I was swept up by her enthusiasm. I had to slow both

of us down and remind her that this phase of the project was not about solutions, but about the data.

Critical Incident Number One

One theme that took us some time to discuss concerned Roz, Angelina's business manager. Roz was consistently brought up throughout the interviews and in the survey as a flashpoint with the employees. They felt her lack of industry experience and strong business attitude did not fit with the rest of the team. She was labelled as Angelina's "bad cop." Roz is a personal friend of me and my wife and I had, had concerns about how my relationship with her might affect the project, before we started this work. In fact, I was anxious hearing negative information about Roz. I wanted to be a professional practitioner and remain objective, yet I felt concerned for Roz and wanted to defend her. I will discuss this incident further in chapter 5, when I discuss my family of origin patterns and how they played out in this project.

Angelina told me that she and Roz had just had a meeting in which they both aired a lot of their concerns with each other. She assured me that they had come through it well and that they were both willing to work on their issues. I felt a sense of relief hearing this. I, however, recommended that we meet with Roz prior to the full-team data feedback meeting. I told Angelina it was important for both of us to provide Roz with a preview of the data about her so that she would not be shocked or embarrassed by it in public. I explained that it is important that managers not be rendered powerless by the data, but have enough understanding of the information and preparation for how they can respond to it, so that they can proceed in ways which are helpful to them and the team.

Angelina and I discussed how we would approach the meeting with Roz and agreed to meet with her in two days. We were very supportive of Roz in that meeting. Roz, like Angelina before her, was not completely surprised by the information. I explained how I thought the feedback about Roz could be reflective of us versus them attitudes, such as artists versus business, structure versus freedom (in terms of scheduling), and management versus employees. Roz was involved in each of these us versus them conflicts because she carried out management responsibilities that Angelina did not have the time to do. The us versus them attitudes were a little hard for Angelina and Roz to understand, but I think they valued my observation that Roz might be perceived by the employees as a scapegoat for all three conflicts, since she was the only management person with a face to attach to them. We discussed what Roz wanted to do with the information and how she would like to respond to it in the data feedback meeting.

I coached Roz and Angelina about their roles in the data feedback meeting, and how their authenticity at the meeting would set the stage for others to be open and honest about the data in order to really discuss what needs to change. The final part of the meeting was dedicated to structuring the timing and outline of the data feedback meeting.

Data Feedback

The Data Feedback Meeting

Monday, January 9th was the data feedback meeting with the team. Angelina had done a great job of making sure just about everyone was there. One person was trapped due to a mudslide near their house, otherwise everyone else attended and we started on time, which was a new behavior since my involvement with the boutique. It was scheduled to take two hours. People were excited. The agenda for the morning (see Appendix N) was

tight and I struggled to keep them on track. Everyone was engaged in the discussion and both Roz and Angelina did a fantastic job of modeling authenticity.

The team began the meeting with the establishment of an additional ground rule to the previously outlined ones, which ensured that the person speaking was given time and space to complete their thought. This became a challenging point for me to enforce as the facilitator. I continually wrestled with the dilemma of letting people go on and the need to keep the meeting moving.

Due to the number of themes to discuss and absorb, and the limited amount of time allocated for the meeting, we were unable to prioritize the themes in the meeting. In spite of that, the team decided on their desired outcomes:

1. Greater clarity among department leads about their roles.
2. More access to Angelina in an informal owner / operator capacity for mentorship.
3. More clarity on where to go for the small needs besides Angelina.
4. More availability to have Angelina less focused on production and more available as a manager.
5. More clarity around the salon's vision and an understanding of what we can do about it individually.
6. Clearer definition of work flow and roles.
7. More clarity and understanding about how the goals connect to the profitability of the salon.
8. Consensus in relation to the posting of goals.
9. Consistent treatment of the different departments to avoid jealousy and animosity among the teams.

The team also went on to decide to hold a meeting on Sunday night at which they would work on the boutique's vision.

Critical Incident Number Two

The data feedback meeting challenged me as a facilitator. I noticed that I was taking on too much of the meeting and that I sometimes compromised with what was occurring, even if I knew that it was not the right direction for the group to be moving.

In terms of the amount I was doing, I kept trying to deflect responsibility back to the team to manage, but they kept looking to me to give them the answers. On several occasions I tried to raise the point that this was their meeting to digest the information I had captured from them. I was trying to get them to decide what they wanted to do with the data in terms of next steps and prioritization. I do not feel I mastered the facilitation of this dilemma of who did what in appropriate amounts.

In spite of that, I do believe the meeting was successful because it brought a lot of the items and issues forward that were discussed in the interviews. But as these discussions occurred, I often felt uneasy with them, since it often did not feel like the group was deciding if the theme they were discussing resulted in a different goal from those already established. So when the team started talking about clarifying the vision and asked if I could help, I said yes immediately. I knew the team was moving to a solution too quickly, in service of avoiding the really difficult work of considering all the information. Instead of re-directing them I joined with them to get out of the uncomfortable space they and I were in. I compromised my personal authority and better knowledge.

My personal authority was further compromised when they tried to schedule the vision meeting in the data feedback meeting. I commented to the team how long it was

taking to make the decision about when to schedule the meeting. I suggested that if they deemed it really important, they would make it a priority. I thought that the team was again avoiding the work of prioritizing the themes, by delaying to schedule the vision meeting. I chose not to mention this thought, so the team could reach an agreement. The meeting time they ultimately selected meant they wound up doing the work of the vision before the time I had scheduled for the intervention.

The Vision

The Visioning Meeting

I anticipated that the time allotted for the vision meeting by Angelina would be insufficient to cover the agenda that I had created. Angelina reviewed the Agenda beforehand and we discussed my concerns. Despite my low expectations for the turnout at this meeting, twelve people attended.

I told them the elements of a successful vision statement:

1. Reality: It must be based in reality to be meaningful for an organization.
2. Credible: It must be believable to be relevant to the employees for it to be inspirational to them.
3. Attractive: It must motivate current and prospective employees to be a part of the organization.
4. Future: It is not where you are now; it's where you want to be in the future.

(Nanus, 1992)

Next, the group responded to these two statements; (a) I understand BCB's current vision and (b) I feel I was a part of making BCB's vision. Using a Likert scale running from 1 to 5, where 1 was "not at all", 3 was "somewhat" and 5 was "completely", the

group indicated their answers in writing. The average score of the twelve participants was 2.96 for the first question and 2.67 for the second question, which I took to mean that there was a lot of room for improvement in terms of people's understanding and connection to the salon's vision (see Appendix O).

The group then drew pictures of their vision of the boutique. The goal with this exercise was to tap into their "prospector" (Miles and Snow, 1978) mindset and allow them to leverage their artistry to help them envision the salon's future. Upon completion of the drawing exercise, they formed pairs to discuss their pictures. Each pair then came up with three words that best described their pictures and the vision they had for the boutique, which I recorded. The plan was to have Angelina work further with the ideas that the group had created and then post the resulting vision in the break room for everyone to react to and comment on. If I were I to do it again, I would have asked one of the employees to take on this task, as Angelina's role might have served to stifle employees' sense of freedom in making comments.

The Final Vision

About two weeks later the team finalized the vision statement for the boutique:

"We envision a place where friendly, world-class services and experiences are delivered by a group of highly talented, passionate and successful professionals who welcome a diverse clientele and collaborate to create innovative ways to nurture and enhance confidence and unique beauty."

Data Prioritization

While the vision work was unfolding, the team was also working, without me, on prioritizing the themes that emerged from the data analysis, which we hadn't had time to address. They elected to vote, in writing, on which theme on the list was most important to them. The votes were collected by May, a member of the team, who helped tally the information. The top two concerns were the future of the salon and department goal setting, as part of decision making (see Appendix P). I found it interesting that both of these issues brought us back to the productivity that Angelina had been concerned with in our initial discussions, which meant the team shared the same concerns as Angelina. There were also a number of high ranking us versus them themes; such as structure versus freedom, artists versus business and front desk versus floor staff, which reinforced some of the communication challenges that were expressed by individuals. Decision making was the fifth ranked issue, which I agreed with, given my experience with how hard it was for the team to finalize and make clear decisions.

Final Goals

With the discussions and written votes by the team and the results of the visioning work in hand, Angelina and I met to revise the goals of the project. The initial goals regarding production, role clarity, and management were no longer as relevant. These three issues were still important, but did not reflect the outcomes that emerged in the data feedback meeting and theme prioritization by the staff. As a result, Angelina and I re-contracted around the revised and final project goals and measurements, which were:

Goal 1 - Increase the connection to and understanding of the salon's Vision.

Goal 2 - Increase the overall communication skills of the salon.

Goal 3 - Increase the decision-making skills of the salon.

All the goals would be measured by a pre and post intervention employee questionnaire.

Once the goals were finalized, how to assist them to accomplish these goals was the next step for me. As an intervention had already occurred with the Visioning work, I suggested decision making and team development trainings for the group (see Appendix Q). Angelina wrestled with how to ensure everyone would be there. If she made it mandatory she would have to pay people, which was not financially feasible. However, she really wanted everyone to attend. I pointed out the difficulty she was having making a decision. Angelina appreciated the observation and I think it helped her come to the decision that it was important enough for her to do what had to be done to arrange for everyone to be present. She decided to close the salon for half the day, pay for everyone to be there and even pay for one of her top stylists to change a training class he had been scheduled to attend the day of the intervention.

Critical Incident Number Three

Shortly after the meeting with Angelina to finalize the goals, I received an email from Kira, the former executive assistant and marketing support employee, who Angelina had terminated in December. She requested me to support her in a legal proceeding about unemployment benefits. I sought the guidance of both my lead faculty at LIOS, Sherene Zolno, and my adjunct faculty, Bev Behrman since I felt in conflict about how to respond to her.

The request presented a dilemma for me in that I had emphasized the confidentiality of the data gathering process in the project and her request was forcing me to consider breaking that agreement by providing information I had gathered during data gathering. Kira's role was a question on the survey; You understand Kira's role at the

salon. The average response from the 16 respondents was 2.56, with 3 representing sometimes and 2 occasionally, which meant that people occasionally to sometimes understood her role. Angelina said and indicated on her questionnaire that people sometimes understand Kira's role.

However, what people said during the interviews represented a bit more understanding of her role than the surveys suggested. People liked Kira, but were not sure what her role was. By the time we did the data feedback meeting Kira had already left the company, which lessened any energy a lack of clarity of her role could have generated. I did not want to be involved in this legal matter by making a statement about Kira's role at the salon and the reason for her termination or departure, which was being disputed in court.

I decided to speak with Angelina about the situation about Kira. I told her that I did not want to get involved with the matter and got her perspective on it. Angelina felt it was a clear cut case and that Kira was fishing for something that was not there by working with an aggressive lawyer friend. As a result she suggested that I ignore the entire thing so that I did not get subpoenaed for information. Ultimately, I crafted a note to Kira explaining my conflicted position. She responded, acknowledging that she understood my position (see Appendix R).

The experience with Kira taught me a great deal about the significance of the data collection process in Action Research work due to the sensitivity of the information gathered and what is ultimately done with the data as a practitioner. Providing the data back to the system is what I did rather than allowing it to be used in an employment lawsuit. I never expected to be in that position when I began the project and making the

decision of what to do was not easy for me. My adjunct faculty remarked on how “tenderly, yet strongly I made my point” with Kira , which was rewarding to hear.

Intervention

Angela and I decided that the day for the intervention would be March 13th. My plan was for the intervention to consist of two parts. The first part was devoted to ensuring that the team understood the different methods of decision-making and the pros and cons of each. The goal was to provide the team with the skills to declare which method of decision making they would use and to discuss why they preferred that method in the future. A pre and post written questionnaire was used to determine the teams’ understanding of decision-making methods (see Appendix S).

The second part was devoted to teaching the team about different communication styles and their impact on working relationships. The goal was to increase the ability of the team members to communicate in the preferred style of the receiver and modify their own preferred style when necessary. Again, a pre and post written questionnaire was used to determine the teams understanding communication styles (see Appendix S).

I also used that day to follow up with a post implementation survey on the progress the team had made in creating the business’s vision.

The morning session was composed of a decision-making exercise, in which the participants were broken into four groups and asked to determine how many M&M’s were in a glass jar. Each group was assigned a different decision-making method to use; autocratic, consultative, majority, and consensus. The participants then filled out a questionnaire (see Appendix T), which asked about their experience of the group’s decision making process in the M&M exercise. I noted and the team reported different

energy levels during their 10 minutes of making decisions. The consensus team was engaged, but farthest from the correct answer. The autocratic team was described as “lifeless” by the participants. The majority team seemed to have and reported that they had the most fun. They also ended up being the closest to the actual number of M&M’s in the jar. In the debrief of the exercise, the participants talked about the pros and cons of the different decision-making styles and the criteria for effective decision making.

The afternoon session involved role plays to help the team understand and experience some of the keys to good communications skills, such as matching and mirroring. Communication styles were then introduced with a four quadrant variation of Zolno’s Social Styles model. Two dimensions of the model were thinking/feeling and introverted/extroverted, which create four communication styles; (a) Rational: the introverted thinker, (b) Controlling: the extroverted thinker, (c) Sensitive: the introverted feeler; and (d) Demonstrative: the extroverted feeler (see Appendix U).

The characteristics of the four social and communication styles were then discussed. Despite some initial resistance, each person eventually chose a communication style that most closely represented their own in order to practice how to communicate with people of a different communication style. Strategies for how to match one kind of communication style with a different kind of communication style were then discussed. Volunteers next worked through sample issues, using the skills they had just learned. This led to the next critical incident on the project.

Critical Incident Number Four

During the communication styles training an incident occurred that gave me an opportunity for immediacy in demonstrating the basic communication skills. May, who

was one of the more outspoken members of the team, asked, “What do you do when two people of the same style butt heads?”, referring to Angelina, with whom she shared the same controlling communication style. May said that when she is asked what she thinks of a decision by Angelina, her concern is that if she tells her what she really thinks, “it sucks”, then she would be fired. Angelina explained that she asks others what they think because she wants to make sure they are okay with the decision that has been made. The team witnessed this discussion escalate quickly, because according to the theory, they both come from the same controlling communication style.

To get some control over the situation, I asked them to slow down the conversation, so that they could paraphrase, and actively listen, by checking for understanding and I introduced the Awareness Wheel (Miller and Miller, 1997), with which I asked them to work their way around it.

I think Angelina came away from this experience with a much clearer understanding of how important it is for her to openly define her intention of asking for feedback or reaction to a decision she has already made and how different that is from asking for input into a decision she is about to make.

This interaction was critical because it brought to life two theoretical models. The first was the Awareness Wheel, which helped the participants understand the importance of separating out and becoming clear on what one senses, thinks, feels, wants, and does in a human interaction, as a means to enhance communication and understanding. The second was the Interpersonal Gap (Wallen, 1968), which was presented in the context of Angelina’s communication issues.

Angelina had previously acknowledged that she had a difficult time with decision making and the communication of the decisions. Once a decision was made, her intention was to tell everyone what that decision was, and assure that everyone was okay with the outcome.

The learning for her and the employees was the difference between the *intention* and the *impact* of Angelina's communication and the Interpersonal Gap that was occasionally created. The fact that we discussed this with the entire team, in the moment, was a learning opportunity that may not have occurred had I not taken May from her initial question to an informed ending.

At the end of the day, each participant completed a post-intervention questionnaire, which was identical to the questionnaire they had answered before the major intervention.

I found it hard to close out the meeting with the so many themes still remaining unattended to and various staff asking for my help with them. However, I also knew the team had to find a way to practice the skills they had just learned and to build their own capabilities to solve the issues this project had brought to light. I could not do that work for them despite feeling pulled to do so by the comments in the meeting, which I will address further in Chapter 5.

Project Completion

A week after the intervention, Angelina and I met for a brief Goal Attainment and Project Completion meeting. I shared reports with her that compiled the results of the pre and post Intervention Questionnaires (see Appendix V). The data indicated an improvement in the understanding and connection to the salon's vision and improvement in the decision-making and communication skills within the salon.

Angelina and I shared frank feedback with each other about our experience of the project and each other. I told her that I believed that the biggest issue that was never addressed was the constant turnover that she created. I explained the impact that turnover had on the salon by describing Tuckman's forming stage; each time a personnel change occurred, team members had to adjust to the departures and arrivals of new people. It also fed the belief in the team that if you crossed Angelina you were out and therefore no one really felt safe enough to speak their truth to her.

Angelina appreciated this perspective and said she wished I had shared more of my thoughts in our meetings. She felt at times our meetings were too "PC" (politically correct) and she wished I had taken the "kid gloves" off sooner with her. I told her that was valuable feedback and asked that if she had any further comments that she please send them to me, which she did (see Appendix W).

In this chapter, I told the story of the project, including the timeline and the critical events that shaped the project and heightened both my learning and the learning of BCB. In Chapter 4, I will describe the measurement process I used and results that were obtained.

CHAPTER 4

Results

This chapter explores quantitative and qualitative measures of project outcomes.

Project Goals

At the start of the project Angelina and I agreed upon the following goals: (a) Improve role clarity, especially for the team leads and for the senior management within the salon; (b) improve the clarity of each individual's production goals in the salon, so that everyone is striving to reach their goals in service of the salons financial well being; (c) increase the management team's communication abilities. After the data feedback meeting, the goals were revised. Angelina endorsed the revised goals and attendant measures, which appear in Table 1 below.

Table 1

Final Project Goals and Measures

| Goal | Measurement |
|--|--|
| 1. Increase the connection to and understanding of the salon's vision. | 1. Pre- and post-intervention employee questionnaire |
| 2. Increase the overall communication skills of the salon. | 2. Pre- and post-intervention employee questionnaire |
| 3. Increase the decision making skills of the salon. | 3. Pre- and post-intervention employee questionnaire |

Measures

To measure the achievement of Goal 1: Increase the connection to and understanding of the salon's vision, I used a two question pre and post intervention questionnaire that I created. It was administered prior to the first intervention and again,

approximately 60 days later. Because the first goal actually contains two goals, connection to and understanding of vision, the first question asked “How well do you understand BCB’s current vision?” The second question asked “How much do you feel you were a part of making BCB’s current vision?” The questionnaire used a five-point Likert scale, where one meant “not at all” and five meant “completely.” Two, three and four, were not defined; they were points between the two polarities.

Goal 2: Increase the overall communication skills of the salon, was measured with a questionnaire that I created, which contained five-questions:

1. How aware are you of different communication styles?
2. How aware are you of your own preferred communication style?
3. How aware are you of the skills necessary to effectively engage other communication styles than your own?
4. How confident are you in your own communication skills?
5. How confident are you in the group’s communication skills?

For this questionnaire, I used a six point, rather than a five point, Likert scale because I learned at a LIOS discussion, after administering the pre-intervention questionnaire for Goal 1, that an even number of question choices is preferred. Even numbers force the respondent to make a choice in either direction rather than migrating to the middle. (I did not change the Likert scale on Goal 1, as I wanted to be able to match the pre and post responses.)

To measure the accomplishment of goal 3, Increase the decision making skills of the salon, I created the following five-questions:

1. How aware are you of different decision-making styles?

2. How aware are you of the strengths and weaknesses of the different decision making styles?
3. How aware are you of the criteria for decision-making effectiveness?
4. How confident are you in your own decision-making skills?
5. How confident are you in the group's decision-making skills?

Again the same six point Likert scale was used with these questions.

The post-intervention questionnaire, (see Appendix S), was a single document, rather than three separate ones, as I had used with the pre intervention questionnaires. It included the 12 questions that had been asked on each separate questionnaire, with the three goals in separate sections and also included a space for comments in order to capture any qualitative feedback from the participants.

Results

Quantitative

Twelve participants completed the same questionnaire for Goal 1 before and after the intervention. The pre- and post-values were paired to enable a Wilcoxon Signed-Rank Test (WRST) with an $n = 12$. I measured the two vision goals separately and created two null hypotheses: (a) the intervention would not significantly affect employees' understanding of BCB's vision; (b) the intervention would not significantly affect employees' connection to BCB's vision. The chosen level of significance for both of these one-tailed tests was 0.05.

Following the steps to perform a WRST, I first determined the magnitude and direction (+ or -) of change between each pre- and post-intervention score for the twelve

employees answer to how well they understood the salon's vision. I also determined the size and sign of any change between them. I next ranked the absolute values of the changes in scores from pre- and post-questionnaire scores lowest to highest. The duplicate delta scores of 2 and 3 were averaged and all changes in values were either 0 in or + in direction (See Appendix X). At this point I discarded the values for respondent 12 because the change between their pre and post scores was 0. This reduced n to 11.

The WSRT generally assumes that the distribution of rank values would approximate a symmetrical or normal distribution between the extremes of -66 and 66 and around a mean of 0. The direction of all the changes here was positive. Since there were no ranks with a negative direction, and W is specified as the lowest possible absolute value of either the sum of all positive ranks (which is 66) or the sum of all negative ranks (which is 0), computing W yields 0.

Referring to a table of critical values for the WSRT (Swanson, 2002, p. 173), tests with an $n=11$ and an $\alpha=0.05$ must reject the null hypothesis when W is less than 14. As such, the null hypothesis for this test, that the intervention would not significantly affect the employees' understanding of BCB's vision, is rejected.

The same WSRT methodology was used as on Goal 1 to measure the project's impact. The null hypothesis was that the intervention would not significantly affect employees' connection to BCB's vision. Changes in scores with a value of 2 and 3 needed to be averaged again in terms of ranking. There was a single negative change in direction and three respondents' scores were discarded in this test due to 0 changes in their pre and post values (See Appendix X). This reduced the n to 9. W was specified at 1, which was the sum of all negative ranks and was lower than 36 (the sum of all positive

ranks). A test with $n=9$ and an $\alpha=0.05$ must reject the null hypothesis when W is less than 8. (Swanson, 2002) As such, the null hypothesis for this test can also be rejected emphatically.

Seven participants who completed the post-intervention questionnaire for Goal 1, did not participate in the vision intervention meeting, so their responses could not be matched and used. However, I found these seven participants questionnaire results interesting. The average score to the question of how well they understood BCB's vision was 4.7, and their average score to the question of how much they felt they were a part of making the vision was only 3.6. Although these respondents were not involved in creating the vision (thus the low scores), they were able to absorb and understand the vision (thus the scores that matched those of the rest of the respondents)

The WSRT methodology was used again to measure the project's impact on the second goal of increasing the overall communication skills of the salon. The times at which the questionnaires were administered were different from Goal 1's methodology. The pre-intervention questionnaire was completed at the beginning of the March 13th intervention meeting for goals two and three and the post-intervention questionnaire was completed at the conclusion of the intervention day. There were 17 respondents. I added their questionnaire score responses to the five different questions together to create a total single pre and post score for each respondent. The range of the total pre-intervention responses was between seven and 27 and the range of the total post-intervention responses was between 18 and 30. The average change of the summed total responses between pre and post responses was 5.82 (see Appendix Y). The null hypothesis for this WSRT states that the intervention would not significantly affect the communication skills

of the salon. The direction of all the changes was positive and overlapping change scores were averaged again in terms of ranking. The $n=17$ and W was specified at 0, which was the sum of all negative ranks and was lower than 153 (the sum of all positive ranks). Referring to the table again (Swanson, 2002), a test with $n=17$ and an $\alpha=0.05$ must reject the null hypothesis when W is less than 41. As such, the null hypothesis for this test can also be rejected.

For Goal 3, increasing the overall decision making skills of the salon, I used the WSRT methodology as well. The pre and post-intervention questionnaires were completed at the same time as the communication skills, Goal 2, questionnaire. The seventeen respondents' scores added together created a total single pre and post score for each respondent. The range of the total pre-intervention responses was between 5 and 26 and the range of the total post-intervention responses was between 17 and 30. The average change of the summed total responses between pre and post responses was 9.38 (see Appendix Z). The null hypothesis for this WSRT states that the intervention would not significantly affect the decision making skills of the salon. All of the changes were in a positive direction and overlapping change scores were averaged again in terms of ranking. The $n=17$ and W was specified at 0, which was the sum of all negative ranks and was lower than 153 (the sum of all positive ranks). A test with $n=17$ and an $\alpha=0.05$ must reject the null hypothesis when W is less than 41. (Swanson, 2002) As such, the null hypothesis for this test can also be rejected.

Three people did not complete pre-intervention questionnaires for the communication and decision-making skills measurements, which meant their post-intervention scores could not be used.

Qualitative

In addition to the statistical significance found in the pre and post intervention questionnaire survey responses, comments were included by various participants in the post-intervention questionnaires. One staff member spoke to the need for continued work by saying, “I feel BCB is going to be very successful and still needs to continue with ongoing meeting pow-wows.” Another staff member spoke to how the training was just the beginning when they said, “I know what I need to do to communicate; it’s just learning to do it!” Finally another staff member spoke to the team building aspect of the communication skill building intervention when they wrote, “I really enjoyed relating each person with their personality traits. I felt this was very helpful for communicational (this is the word the participant used) understanding and really fun!”

In addition, Angelina told me during our debrief of the vision intervention meeting that the process I led the team through had really helped her understand some of the ideas her staff had for the salon’s vision. She went on to say that the additional information helped her in two ways; (a) it reaffirmed her own beliefs for the vision of the salon, which gave her more confidence and (b) it made her feel more connected with her team and less isolated by the burden of having to be the only visionary at the salon. During our final debrief, after the second intervention, she showed me a chart she had put together, of the individual team members preferred communication styles (see Appendix AA). She had posted a large copy of this chart in the salon break room and the team had committed to updating it to include new hires as they joined the salon. Despite people’s initial resistance to being placed in a box, she claimed, they were referring to the chart regularly and were working to adapt their styles for more effective communications. She

also suggested that her decision-making confidence had risen since the intervention and that she was less wary of the process. Angelina's feedback and the positive comments from the participants of the interventions I heard further supported the results of the statistical measurement and results for the three separate project goals.

In this chapter I have described the quantitative and qualitative results of the project. In the next chapter I will describe the impact my personal background had on this project.

CHAPTER 5

Personal Impact

In this chapter, I discuss the influence of my thoughts, history, skills, and predispositions on the project and its outcome. I explore these influences from the perspectives of my family of origin experience, previous work experience, the Thomas-Kilmann conflict mode instrument (TKI), personal authority, and the Fundamental Interpersonal Relations Orientation-Behavior (FIRO-B) instrument. I discuss the impact that the project had on me personally. Lastly, I discuss the feedback that I received from my client group about my presence and performance.

Family of Origin and Work History

I am the third born, only son, and namesake in a family of five. My parents separated for a year when I was 13, reunited for five more years, and then divorced when I was 19. My two sisters are five and seven years older than me. They are dramatically different from each other: one is blonde and an artist, the other is brunette and an accountant. My role in the family was the proverbial “prince” due to the fact I had three females looking after me constantly and my sister’s felt as though I was treated differently and spoiled because I was the only boy. I think the role of the “prince” also added a certain amount of pressure for me to do things perfectly and make sure I represented the family well. I carried this weight with me into my engagement with Brightly Colored Boutique (BCB) and spent a fair amount of time worrying about making sure I was progressing with them correctly.

As the youngest in my family, I also spent my childhood flexing and adapting to whatever was put in front of me in order to match the other four members of my family. Their personalities were all very different. I have already spoken to the vastly different personalities of my sisters. My mother is an extremely caring and sensitive person that goes out of her way to help others, while my father is an energetic, driven and very outgoing individual that has been successful in the business world. Given these differences in my four other family members, I have been described as the “flow-master” by my family because of how well I honed the skills of adapting to each of their personalities when needed. I think this adaptability served me well in the project given the various personalities and challenges I encountered while working with BCB.

I also kept a watchful eye at all times to make sure that everyone was all right in my family and that I disappointed no one. At an early age, I became an expert in observing behavior, evaluating moods, and discerning what needed to be done to keep things calm and smooth. I also internalized the message that positive feedback was the only kind of feedback, because anything that was critical, hurtful or brutally honest I judged to be damaging to a relationship based upon what my parents modeled for me and what ultimately happened to their relationship. The end result was that I became the ultimate people pleaser and conflict avoider. This both served and disserved me in the project. It helped me during the data feedback process to ensure that Roz was prepared for the feedback that concerned her and had time to determine how she wanted to address it in the team meeting. My people pleasing and conflict avoidant tendencies hindered me during individual coaching sessions with Angelina and in the data feedback, which I will expand upon later in this chapter when I discuss personal authority.

These same skills also served me well in playing team sports and professionally. I was always a great team player, sacrificing my own needs for the good of the team. When I became a captain, I led by example and would let others shine by getting assists rather than goals and doing the dirty work that often went unnoticed. I switched positions all the time and was able to acquire the necessary skills to quickly adapt and be successful. I took these same attributes and applied them to various professions that eventually led me in the direction of sales in the financial services industry. My signature presence was a consultative sales approach where I worked with the prospect to understand their needs and then did everything I could to help them succeed and keep them happy.

It was no surprise that these well honed skills and default behavior patterns showed up in my practitioner skills at BCB. I purposely chose an industry I knew nothing about for my master's thesis field project (MTFP) in order to go beyond my comfort zone of being an expert consultant. My goal with the project was to learn the skills necessary to become a process consultant. However the client system tested my ability to change.

The majority of the employees at BCB were female, similar to my family, and they desperately wanted my help to "fix" their issues. Angelina embodied traits of both my sisters. Like them, she was older than me. She was both an artist (eyebrow sculpting and painting) by trade and a numbers driven, results oriented leader. I found myself early on in the project going to great lengths to ensure I was making her happy, just as I had done with my sisters, in service of joining with her. The prime example of this was in regards to the goal setting process. I quickly agreed with her suggested goals and found it extremely challenging to continually come back to her for more specific and precise goals.

Thomas-Kilmann Instrument (TKI)

The TKI (Thomas & Kilmann, 1974) is a tool that enables people to understand their preferred mode of handling conflict. It provides insight into how different modes affect personal and group dynamics and helps people learn how to cultivate modes beyond their default, choosing the most appropriate style for a given situation. It is intended to help a person assess their reactions to and behaviors in a variety of conflict situations. My TKI results came as little surprise to me: I scored a perfect 100 percent as a conflict avoider and 90 percent as an accommodator.

I was observant throughout the project of my reactions in conflict situations, and the extent to which I could exert my personal authority to engage in the conflict. Early in the project I did not want to rock the boat with Angelina. I avoided immediacy and challenging her ideas. As the project went on I became more assertive. For example, I eventually chose to respond to Kira's request for feedback in support of her court case, despite Angelina's advice to let it pass so that I did not get subpoenaed. The big step for me was to go back to Angelina and tell her I had responded to Kira and to explain my reasoning, which I feared might disappoint her. In the end it did not upset our relationship, but it tested my assertiveness.

Personal Authority

Williamson (1991) described personal authority as the ability to voluntarily claim both authorship and responsibility for all of one's thoughts, feelings, and actions.

Claiming my personal authority was an important task for me in this project.

Two occasions stood out as helping me learn how to exert my personal authority. The first occurred during the data feedback meeting when the team was focused on

clarifying the vision. I recognized that their rush to solution was a way to avoid the harder discussion about the data themes and how to prioritize them. Although my gut told me to speak, I did not. I let them continue talking. They eventually decided to have a two-hour meeting a week later to work on the vision. Even this outcome did not sit well with me. Two hours didn't seem sufficient to create a vision. But, out of my concern for my relationship with Angelina and the project going forward, I didn't speak up. In Williamson's words, I did not respect my own judgments enough to take action.

However, when the next opportunity arose (during the second intervention meeting) I spoke when I heard Angelina incorrectly talking about communication styles. In the moment I was able to not only demonstrate and facilitate the correct way to diagnose an Interpersonal Gap (Wallen, 1968), but more importantly I did what was right for me and ultimately BCB despite how it might have impacted Angelina's authority and my relationship with her. This was a huge turning point for me, as I learned that I could wield my personal authority when I was confident of my position and Angelina would not only listen but respond positively to what I had to say.

FIRO-B

The second tool I used as a basis for my engagement in the consulting project with BCB is the Fundamental Interpersonal Relations Orientation–Behavior (FIRO-B) (Schutz, 1966). Schutz created a theory and measurement instrument that describes three dimensions of interpersonal relations: inclusion, affection, and control. He believed that these three dimensions could explain most human interactions and how people relate to one another. Answers to questions about inclusion, affection, and control yield scores, which the respondent records in two boxes: wanted and expressed behavior. A high or

low score in wanted or expressed control, affection, or inclusion, means that an individual might experience anxiety when in relationship with others regarding one of these three dimensions.

My FIRO-B scores were high in the areas of affection and control, which I discuss in terms of the project.

Affection. The score for expressed affection (how much I (a) make an effort to get close to people, (b) am comfortable expressing my personal feelings, (c) try to be supportive of others) demonstrates my ability to join, but the desire to join is infused with some anxiety. I believe that this score is in the high range because I experience anxiety when I cannot get close to people to be supportive of them.

I have a desire to connect to individuals and show that I like them, and I want them to like me and feel close to me. The score for wanted affection (how much I want others to (a) act warmly toward me, (b) share their feelings with me, (c) encourage my efforts) is also high. I recognize that I have a high need for affection. I want individuals to want to feel close to me, and when I perceive that they don't feel connected to me, I get anxious. I have a strong need to be liked, which can be a hindrance and cause anxiety in me at times.

I experienced anxiety at moments during the consulting project because of these desires for expressed and wanted affection. I wanted Angelina and the group members to like me. As a consultant, I believe that I am going to have to use my joining skills in a way that allows me to be part of the system, but also recognize that the system may not always embrace me in the same enthusiastic manner. I want to use my skills in initiating connection in the joining phase but not get too attached to having it reciprocated. I want

to continue to develop my range and ability to express closeness but be able to detach from the client and not feel a need to be liked at all times. This affection paradox (expressed and wanted) surfaced for me at the end of the project when it became clear to me that the group liked me. They expressed a desire for me to help them further. For my part, I wanted the group to know how much I liked them and wanted them to succeed. The tension for me was that I felt as though I was abandoning them, which was hard for me as I have wrestled with issues of abandonment ever since my parents divorced. However, I knew it was time for me to leave and for them to apply the skills they had learned towards addressing the issues raised in the project.

Control. I scored high in wanted control and scored moderately high in expressed control. My score for expressed control (how much I (a) prefer to exert control and influence over things, (b) enjoy organizing things and directing others) demonstrates my tendency to let others lead. However, I was in the high end of moderate score because I still like to have influence and I am willing to provide structure and direction for others. I see this as a benefit for me as a future process consultant. My ability to work collaboratively with a project sponsor rather than taking on too much responsibility and over functioning will be critical. Angelina and I wrestled with this dynamic at times during the project. She wanted me to do more. I did not want to become a “pair of hands.” (Block, 2000)

My score for wanted control (I feel most comfortable working in well-defined situations and will try to get clear expectations and instructions) was very high. I recognize that I have a strong need for direction and external authority that sometimes can be described as dependency. I would rather follow than lead and in the absence of

leadership or clear direction I get anxious and look for it outside of myself. This dynamic played out at different times during the project, especially in the large group meetings when I instinctually looked to Angelina for direction or guidance in certain situations. It turned out that in most of those moments, she was expecting me to lead the meeting and was frustrated by my reliance on her. I now see that contracting with a sponsor about control as critical to the success of the project.

Feedback from the Client System

I collected feedback on my role as a practitioner from the client system in two ways. The first was through the post-intervention questionnaire that had room for comments. One participant wrote that the meeting was, “very informative, helpful and excellently organized.” Another wrote “remarkably we made it through on time, it felt thorough.” A third wrote, “thank you for your hard work on our behalf.”

The second source of feedback was from Angelina in our project closure meeting and the subsequent e-mail (see Appendix W) she sent to me. The key pieces of feedback she provided were:

- From beginning to end, you were respectful of our time and work by being on time, sensitive, informative and warm. You communicated with me via e-mail very well.
- I wish you had pushed me a little harder to focus on the team as a whole instead of the individuals, even though we gleaned important information.
- I felt “helped” more near the end...I sensed a greater confidence in you as a coach and teacher by that time.

- I enjoyed the more assertive George, which I saw in the final meeting. I didn't enjoy the feeling of being handled with "kid gloves."

I interpreted this feedback in a couple of ways. The first is that Angelina might have been looking for more of an expert consultant who would tell her exactly what she needed to do and solve her problems for her rather than with her. The second is that when I started exerting more personal authority and assertiveness toward the end of the project, Angelina received it well. This feedback and the realizations had a large impact on me and will definitely shape how I practice going forward.

In this chapter, I discussed the personal impact I had as a consultant on the project and, conversely, the impact that the project had on me. In the next chapter I will summarize the project as a whole and my learning from it.

CHAPTER 6

Summary and Conclusions

In this chapter I summarize the project, provide conclusions about the factors that influenced the project outcomes, and share the learning that I have drawn from the experience.

Project Summary

The client system was Brightly Colored Boutique (BCB), a full service salon, spa and lounge located in a downtown section of a large metropolitan city. BCB offers complete hair, skin, make-up, body, and nail care and had been open for only six months when I started working with them. The client system consisted of Angelina, the business owner, individual contributor, and project sponsor; the business manager; and 22 full-time employees, and five contractors, who rented space.

The project followed an Action Research Methodology. After the initial entry and contracting phase, Angelina and I agreed that the work would focus on the following initial project goals: (a) improve the role clarity, especially for the team leads and for the senior management within the salon, (b) improve the clarity of each individual's production goals in the salon, so that everyone is striving to reach their goals in service of the salon's financial well being, and (c) increase the management team's communication abilities.

Data collection followed, which was conducted via the completion of a data gathering survey by all the employees, which explored goals (individual, department, and boutique), roles, and overall behaviors; and 30-minute individual interviews. The

information gathered from these two methods was then analyzed and sorted into 14 themes: (a) personnel, (b) decision making, (c) posting of goals, (d) recognition and celebration, (e) lack of faith in the ability of Roz to relate to the industry, (f) lack of access to Angelina when it is needed, (g) lack of knowledge of how to use Kira, (h) lack of consistency in how department leads are used, (i) “us versus them,” (j) quid pro quo, (k) the overall environment, (l) work schedules, (m) music choice, and (n) the future of the salon.

A data feedback meeting was then held at which the themes were shared with all the employees. As a result of the ensuing discussion, the project goals were revised to those shown in Table 2 below. Later, the interventions were chosen: (a) a two-hour vision creation workshop, and (b) a five-hour team event training that explored communication and decision-making skill improvement.

Table 2

Final Project Goals and Measures

| Goal | Measurement |
|--|--|
| 1. Increase the connection to and understanding of the salon’s vision. | 1. Pre- and post-intervention employee questionnaire |
| 2. Increase the overall communication skills of the salon. | 2. Pre- and post-intervention employee questionnaire |
| 3. Increase the decision making skills of the salon. | 3. Pre- and post-intervention employee questionnaire |

All the employees completed a questionnaire prior to the intervention, which explored various aspects of the final three project goals. The same questionnaire was

reintroduced to the employees after the intervention, in order to measure the success of the intervention.

Statistical analysis of the employee questionnaire administered before and after the two interventions showed that a significant positive change occurred in the employees' understanding and connection to the salon's vision, communication, and decision-making skills. Additionally, as a result of this project, the salon had a revised vision statement, a grid that mapped all of the employees preferred communication styles, and a process for evaluating the quality of the decisions they made. Qualitative written feedback from the employees reflected an overall appreciation for the process and the skills they acquired during the interventions.

Conclusions

Reflecting on the project, three related factors contributed to its success: (a) a dedicated and courageous sponsor, (b) a clearly defined structure and process, and (c) my ability to adapt.

A dedicated and courageous sponsor

The first time I met with Angelina I was impressed with her willingness to be open and honest about her strengths and weaknesses. She sought help in a variety of ways, not only from me and this project. She strove to be a successful business owner and leader and sought out feedback wherever she could. Her openness to learning carried through to our coaching conversations. Angelina was also self-aware. She calmly received and absorbed the potentially hurtful feedback about her that was collected during data gathering and acknowledged several times that she was not surprised by it. Her attitude helped me immensely. I approached the meeting with Angela, in which I told

her the results of the data gathering, concerned about how she might receive the feedback; her ability to receive it objectively (rather than taking it personally or being defensive) allowed us to talk constructively and creatively about the themes rather than wasting time justifying them.

Along with Angelina's intrapersonal skills, she supported me as a practitioner by working hard to establish herself as an effective sponsor for the project. This made the processes we went through easier to discuss and appreciate together. With her playing her role well, it made it easier to play mine. Angelina's example of vulnerability and honesty in the second whole-system intervention was a critical point in the project, which also contributed to her being a pivotal positive contributor to the project's success. And, how she did things demonstrated to the group that it was okay to open up in this system and encouraged inquiry and interpersonal communication. She was a leader who used role modeling to encourage her team.

Finally, Angelina was committed to seeing the project through to completion. For various reasons, the project ended up spanning almost eight months. Without Angelina's consistent commitment and willingness to engage in the process, the project could have easily lost momentum and been substantially less productive.

Clearly defined structure and process

Action research was used throughout this process. Because of the duration of the project, it was helpful to have a road map to follow and refer back to as we collectively worked the steps of the process. The thing I like about Action Research is that it is not a perfectly linear process. It is designed to allow the practitioner to go back and forth

between steps of the process all the way along by constantly gathering data, feeding it back to the system, and then gathering more data and adjusting accordingly.

At certain points during the project when Angelina, or members of her team, expressed frustration about “where this is headed?” or “why are we doing this?” I could refer back to the steps of Action Research and explain with confidence where we were in the process and why it was important. The result was that Action Research forced me to be structured and methodical in my approach as a researcher and practitioner. I also believe that the Angelina and her team members benefitted from the structure and process that Action Research provided, which was lacking in many ways at the salon, by offering a model of how structure aids a groups’ process.

My ability to adapt

In the previous chapter, I spoke about my flexibility and adaptability and my title as “flowmaster” in my family of origin. Upon reflection, I realize that, that skill served me well in my engagement with BCB. Not only did I decide to work with a company in an industry I knew nothing about, but I was also just beginning to learn the nuances of Action Research. In fact, my entry with BCB began before the Action Research curriculum at LIOS had started, which meant that early on in the project I was flying blind at times. Once the curriculum began, I experienced a great deal of just-in-time learning that I needed to apply quickly. I was also learning more about myself as a systems practitioner. As Block (2000) explained, the consultant can understand a lot about the system by observing the interactional pattern with the client. I had been in training all my life as an observer of the system in which I was immersed. It was only

until I took on this role in a formal capacity that I could appreciate the benefits of my early experience.

My adaptability was tested in several ways throughout the project. One way was in terms of physical space during the project. I was coming from the perspective of more traditional work spaces where managers had offices and meetings were held in conference rooms, so adjusting to the way BCB operated was a challenge. The salon was clearly not set up for private meetings, which meant a lot of discussions were in open space, with customers, employees, and music all contributing to the dynamic. If discussions occurred in a private space, they happened across a massage table. In fact, most meetings with Angelina and the interviews with the staff occurred off-site at coffee houses. Finally, the team meetings and interventions happened in the main area of the salon with participants in hair chairs and flip charts hung on the mirrors. I made the most of the space provided and worked within the system, even though it required a great deal of flexibility. This challenged me in ways to work with what the system provided and to manage my expectations about how an intervention should look. I think a happy medium could have been reached between the formal meeting space and the totally open, random meeting space. A formal setting might have helped with Angelina's goal of trying to make her employees more businesslike, by providing a shift in the structure of the meeting place, thereby causing a change in the structure of the meetings. As a result of these awarenesses, the physical space for meetings is something I will be more consciously selective about in future projects.

The Action Research process further demanded my adaptability. The continual dance of collecting data, feeding it back and adjusting led to several goal revisions, and

multiple interventions. Action Research is not a linear process and BCB was not a static organization. As a newly formed organization, they were continuing to evolve, creating their identity, culture, and structure. Each evolution created new data to be considered for the work to be done on the project. In the midst of the work there were ongoing changes in personnel, people leaving and new ones coming in, which had a significant impact on the team. BCB was under financial stress, trying to become profitable as quickly as they could, while distinguishing themselves in a competitive landscape. This continual change forced me, as a practitioner, to (a) flex and adapt with them and the Action Research process, (b) provide some level of structure to ensure that the project continued to move forward and achieve the goals, and (c) recognize, honor, and leverage my skills at adapting.

Summary of My Learnings

While my Master's Thesis Field Project (MTFP) provided countless opportunities for growth and reflection, I will highlight several areas that I believe to be the greatest contributors to my learning. These areas are: (a) having clearly defined goals and measurements, (b) the importance of a realistic timeline, (c) the importance of confidentiality, (d) the power of authenticity, (e) rescue or responsibility, and (f) role as a process consultant.

Clearly Defined Goals and Measurements

A great deal of time and energy was spent early on in the project working to define goals appropriately. The challenge was how to make them specific enough so that they could be measured and realistic enough given the time frame of the project. I am

thankful that the time was spent because it gave me practical experience in seeing the need for concentrated attention given to the goal formation at the front end of a project.

One of the shortcomings of this project, I believe, was that the final data prioritization and goal setting did not occur in the data feedback meeting with the entire BCB team. As a result the goals were only finalized with Angelina and there was never a chance to get buy-in of the team in the formation of the final goals. I now know that it is just as critical to have the whole team involved in the goal setting process, in order to increase their commitment to the interventions and so that they don't think the consultant is a tool for management. The decision to not involve the entire team in the goal setting process also could have served to reinforce their belief that they were not a part of the decision-making process at the salon, which was something we were trying to change in the project.

When it came time to measure the goals, I realized that the first goal statement included two separate goals. In the future I will help the client to define their goals more explicitly, by breaking them out separately, so that they can easily be measured for the success of each. I also did not directly tie the questionnaire to the goal; instead I asked how much the person felt a part of the vision creation. The underlying assumption here is that if a person feels they were a part of creating the vision, then they would be more connected to the vision. If I had it to do again, I would use the exact goal language in the question, to make the possibility of variance on the measurement of the goal less.

Realistic Timeline

I learned a great deal about how long and involved the Action Research process is. I estimated at the start of the engagement, when writing the proposal, that the project

would entail 42 hours of work and I ended up spending 55 hours on the project. (See Appendix G). Part of this was due to my learning along the way and part of it was due to the amount of time that I took on in the project. I learned the importance of setting clear and finite goals, because the goals determine the scope of the project. Having three (actually four—due to the compound vision goal) different goals greatly expanded the time commitment. It led to multiple, time-consuming interventions and ten and half additional hours of work than I had estimated due to all the planning that went into preparation for the meetings.

The decision to perform 17 thirty-minute individual interviews also required a great deal of time. The interviews were extremely valuable in terms of data gathering, but I learned that thirty minutes is not enough time for a successful interview that allows for time to build rapport with the interviewee and ask more than two questions. In the future I will schedule less interviews for longer periods, say forty-five minutes to an hour, or be sure to estimate my data gathering time better based upon the number of people in the system that I will interview for longer periods of time. Despite the short interviews, I still spent nine and half additional hours than I originally estimated gathering data, which is the main purpose of action research.

The evaluation and closure of the project took less time than I had estimated, which I regret because I could have gathered more solid data and feedback from the entire system about my role as a process consultant from them. I also spent less time in the problem solving and action planning step of action research in this project, which surprised me. I thought going into the project I would have to do a lot of explaining about the action research process, probably because it was all new to me, but in hindsight a lot

of the process came naturally and did not need extensive explanation for Angelina to get behind the work. My experience with BCB and understanding of the ebbs and flows of the various steps of the action research process will serve me well as I estimate the various parts of the work in future projects.

Importance of Confidentiality

The third critical incident, mentioned in Chapter 3, was specifically related to the issue of confidentiality. Kira's request for a statement from me on her behalf in her lawsuit against BCB was a real wake-up call about the importance of confidentiality and my role as a practitioner in a system. The data gathering phase of the project gave me insight and access to a number of issues and opinions within the salon. That information is proprietary to the organization and my job is to report it back to them in a way that allows them to make further meaning of it through open discussions. The success of Action Research in general, and of this project in particular, was directly tied to the value of the information that the employees shared with me. Their willingness to do that, I believe, came from the combination of the pain they were experiencing and the emphasis on confidentiality that Angelina and I communicated at the beginning of the project. Little did I know that confidentiality and my commitment to maintain it would become such an important issue to the project. As a result of this experience, I will continue to emphasize the importance of confidentiality and ensure that I have established the necessary boundaries to maintain that confidentiality, unless it is going to cause harm to an individual or the entire system if it is not revealed in a professional way.

Power of Authenticity

I saw the power of authenticity in two places during this project. First, I observed that as I became more confident in my own personal authority and assertiveness with Angelina, the more engaged she became as a sponsor. It seems to me in consulting, there is a fascinating paradox of maintaining the relationship with the sponsor, while simultaneously being authentic by challenging their assumptions, using immediacy, and challenging them to grow. Prior to now I would have seen telling people the truth about things that may offend or hurt them as a negative, a relationship destroying action. Now I see the practice of giving behaviorally concrete feedback about behaviors that may play a role in the success or failure of the client achieving their goal, as a necessary part of the consultant's obligations to the client. Upon reflection I think I spent too much time focusing on what I said to Angelina and how it might impact our relationship and the success of the project. The result was that I squelched my own authenticity with her and the team, which ultimately was a disservice to them and me. I take away a desire to learn more about being authentic earlier in the process of consulting and with more consistency.

The second powerful learning was observing Angelina's authenticity as the leader of the salon. When she was vulnerable, open to feedback and learning, and genuine in her concern for others, her team felt it. I saw her develop this skill during the course of the project. In the early team meetings Angelina was less able to be authentic and the team was noticeably disengaged. However, with each subsequent team meeting (data feedback and the two different interventions) she showed more of herself and the team responded. Without that kind of an example from a sponsor, in a meeting, I am not sure how

successful a change project could ultimately be. The authenticity does not have to be perfect, it just simply has to be there to invite others to do the same.

Rescue or Responsibility

Upon reflection I have a much greater appreciation of the Client Responsibility Model (O'Neill, 2000) and how critical it is to the success of any Action Research project. My tendency for avoiding conflict and being a team player and people-pleaser leads to me saying yes to a lot of requests. This tendency is particularly dangerous when it comes to process consulting, where the goal is to help the system figure out the solution on its own. My tendency to over function runs counter to empowering the system, especially if there is to be lasting change after I leave. I wrestled with this at BCB and with Angelina in particular, as there were times I did too much and invariably lost the engagement of the team. Therefore, I want to be able to clearly articulate this Client Responsibility Model to future clients so they can understand how I can work most effectively with them and their teams and I can remember the principles that help me to not over function.

It is also critical to demonstrate this model for the client by asserting myself and establishing my boundaries in my role as a consultant. I did this early on with Angelina when she wanted me to write my own introduction for her to use at the team meeting and I think that helped us work more collaboratively going forward.

Role as a Process Consultant

Deciding not to rescue my client and slip into the role of the expert is a critical learning for me and a definite edge for me to continue to explore. There is something so enticing for me about feeling needed and having the answers. My challenge is to not to be

seduced by the allure of being the hero and instead focusing in on the process, which is not where the limelight exists. I recognize this from my days in team sports, where certain roles are very utilitarian. I like Weisbord's (1987) metaphor for describing the consultant's role as the "stage manager" and "letting those involved make the movie" (p. 236). I learned that being a great process consultant requires that I focus on guiding the process and structure and not the content. The more I am able to do that the more I think I will be able to relax and let go of the expectations of a "prince" who has to have all the answers and do everything perfectly.

Final Thoughts

In this chapter, I have provided a brief overview of the system, conclusions from the project, and pertinent themes where I have gained learning. The legacy of this project will be a reminder to me of the arduous process that stretched over the course of almost four years from the time I first spoke with Roz about the possibility of working with BCB to this present moment, as I am nearing completion of writing this thesis. I know that I am extremely fortunate: I was able to learn throughout this process, while adapting along the way and ultimately benefiting from prolonged reflection. Unlike my normal behavior, and that of the salon, of rushing to get things done, the additional time afforded me a broader perspective on just how significant this learning process was for me.

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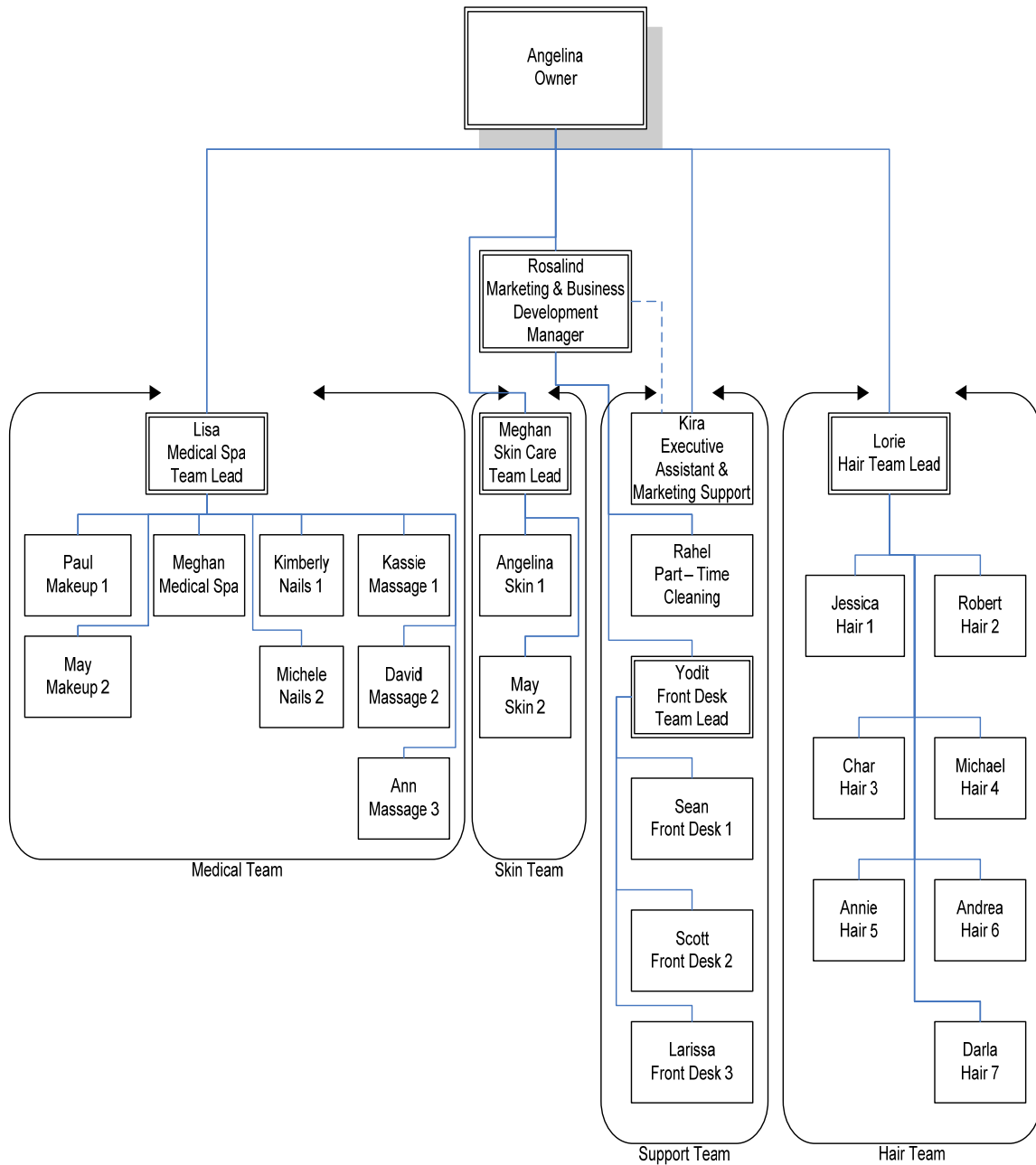
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APPENDIX A

Bright Color Boutique (BCB) Organizational Chart



APPENDIX B

Angelina's Business, Work-Process and Human Relation Goals

Business Goals = Bottom Line Goals

- Current Goals are \$30,000 weekly and \$125,000 monthly
- Targeted goals are \$75,000 weekly and \$312,500 monthly, 2 ½ times improvement. This level of production will get her to her previous earning potential and raise other key employees income
- Medical Spa is only booking at 10% of their potential, need to increase overall productivity
- Hair department to improve production by 50%
- Skin care department to improve production by 50%, outside of Angela's production
- Double current product sales

Work-Process Goals = Specific work behaviors that are not currently happening that are necessary to drive business and contribute to the bottom line business goals.

- Increase number of Pre-booking by clients for their next appointment.
- Increase sales of product to customers.
- Increase the number of customers educated on, trying or buying other services in the spa.
- Send thank you cards to all new customers thanking them for their business
- Make all Clients aware of Bright Color Boutique's Party capability

Human Relations Goals = How team members relate to each other and work more effectively.

- Improve Angilina's ability to work effectively with her Team Leaders to define their roles and goals.
- Improve Team Leaders effectiveness in establishing, monitoring and inspiring departmental goals.
- Improve Individual Staff's understanding of their roles and goals and how those contribute to the departmental and overall business goals.

APPENDIX C

25 High Performance Factors (Crosby, 1992)

1. Sponsorship

The team is firmly supported. Employees are provided all the direction, resources, clarity and enthusiasm to guarantee success.

2. Openness

Information flows freely and accurately so that problems are identified in a timely fashion. Disagreements are viewed as opportunities for dialogue and are dealt with directly.

3. Influence

Employees have input and influence on factors that impact their work life (i.e., suggesting solutions, often seeing suggestions being acted on, and getting feedback when suggestions are rejected.)

4. Distinguish Between Decision Making and Influence

Managers are clear about the distinction between “who is deciding” versus “who is influencing” and communicate that.

5. Decisions Are Made

Decisions are made in an expedient amount of time; it does not take forever to get a decision made.

6. Implementation

Once decisions are made, they are effectively implemented in a timely way.

7. Input Needs

We get all the information we need from outside or inside sources, on time and with quality.

8. Throughput

Once input is received, we are organized in the best possible way to produce quality output in a timely manner with clear and efficient processes.

9. Output

We give to others what they need and provide excellent service – on time and with quality. This includes internal customers (within the organization) and external customers.

10. Meetings

Our meetings are effective. Time is not wasted. Appropriate people attend. Participation is shared. When needed, we solve issues and decisions are made.

11. Creativity

New ideas for improving work processes, products and communication are encouraged. It is easy in our climate to suggest or try something new.

12. Job Clarity

I know exactly what I am to do. My expectations for my role are clear. My job does not unnecessarily duplicate someone else's job.

13. Person-Task Fit

The right people are doing the right tasks. My skills and the skills of others are being used effectively here.

14. Authority

People have the authority to do what they are expected to do. They typically do not have to be persuaded or manipulated to act in the absence of higher authority.

15. Resource Availability

We are able to get the resources we need to do our jobs well. These include information, equipment, software, tools and support.

16. Team Measurements

We have measurements that help us regularly track key factors related to our input, throughput, and output so that we can monitor and quickly solve identified problems and issues.

17. Big-Picture Perspective

We know the larger picture, i.e., where our organization is headed, how external factors affect us, and how we are doing. For our daily work, we know why we are doing what we are doing.

18. Training

Members of our team are well-trained to perform their tasks – both generally and technically.

19. Priorities

No time is wasted wondering which task is more important. Priorities are clear and consistent.

20. By-Whens

Whenever a decision is made, someone clarifies who will do what and by when.

Due dates are both received from, and accepted by, management.

21. Follow Through

Commitments are effectively tracked (e.g., reviewed at subsequent meetings or tracked through a database). Missed commitments are discussed and recommitted or are reassigned to someone else.

22. Single-Point Accountability

There is one person accountable for each task. Even in cross-functional groups, one person holds single-point accountability, rather than the group.

23. Reinforcement

People are appreciated for work well done. Expressions of thanks are clear enough so that the receivers know precisely what they did that was liked.

24. Reprimands

When our supervisor is unhappy with our work, he/she tells us as soon as possible, privately. The feedback is clear and very specific (about the task or work) and not accusatory, judgmental or vindictive.

25. Work Relationships

Work relationships are maintained. When two or more people disagree, the issue is dealt with directly and effectively – rather than being avoided or escalated.

APPENDIX D

Styles of Decision Making (Johnson & Johnson, 2003)

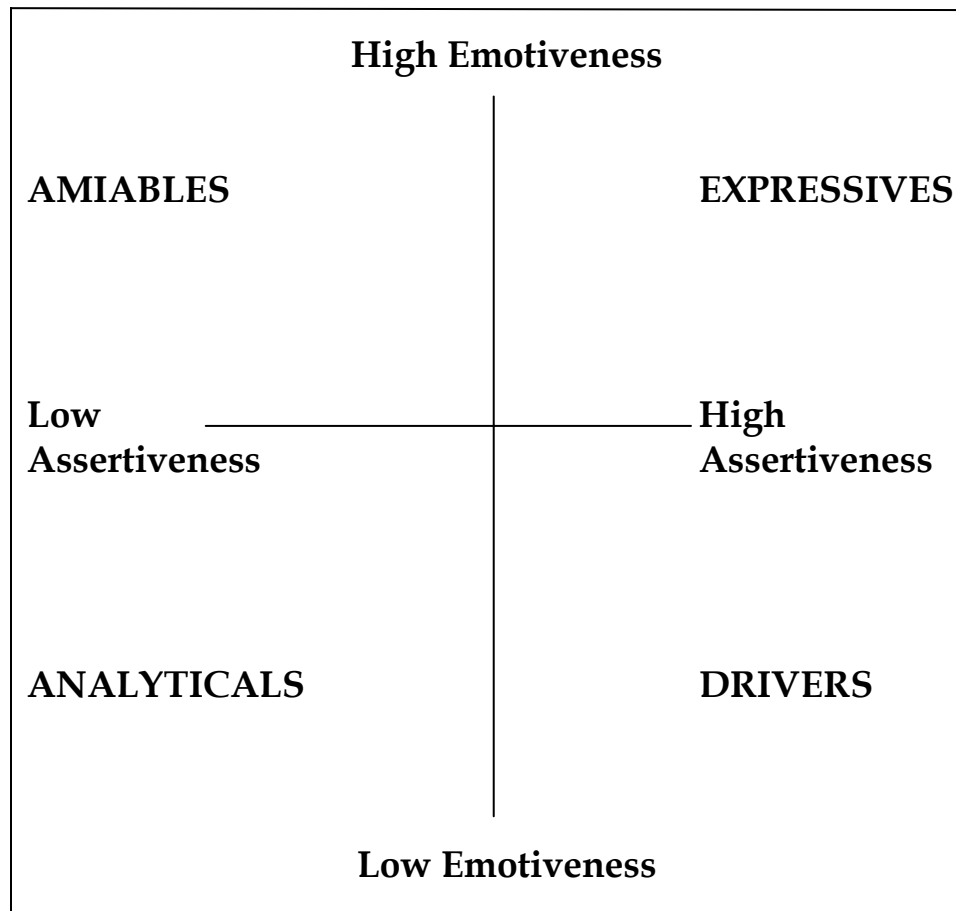
1. **Autocratic:** In the most extreme form (Aut1), the leader defines & solves the problem; makes the decision alone. In a modified form (Aut2) the leader obtains factual information from others, and then makes the decision alone. Here the leader does not share the nature of the problem or request opinions – she simply obtains information to inform her decision.
2. **Consultative:** A consultative decision can happen in two ways. A leader can ask others individually for input about a problem or decision issue (Cons1). Input can include both information and opinions. Then the leader makes a decision. Another way is for the leader to pull together a group of people to obtain input (Cons2). The leader explains the nature of the problem to the group, and the group provides input to the decision. Then, the leader uses the input to make his or her decision.
3. **Consensus Decision:** “Consensus is...a collective opinion arrived at by a group of individuals working together under conditions that permit communications to be sufficiently open – and the group climate to be sufficiently supportive – for everyone in the group to feel that he or she has had a fair chance to support the decision. When a decision is made by consensus, all members understand the decision and are prepared to support it. In operation, consensus means that all members have had a chance to tell the group how they feel about the decision, and those members who continue to disagree or have doubts will nevertheless say publically that they are willing to give the decision a try for a period of time.

4. **Majority Vote:** Determine how many people support various options, and go with the majority.
5. **Delegative Decision:** The leader delegates a problem issues to an individual or a group, provides relevant information and resources, and authorizes them to decide. The leader is then willing to support whatever decision is reached.

Typically, this method would be used when the leader believes those receiving this authority are highly skilled, motivated, and willing to act in the interest of the organization.

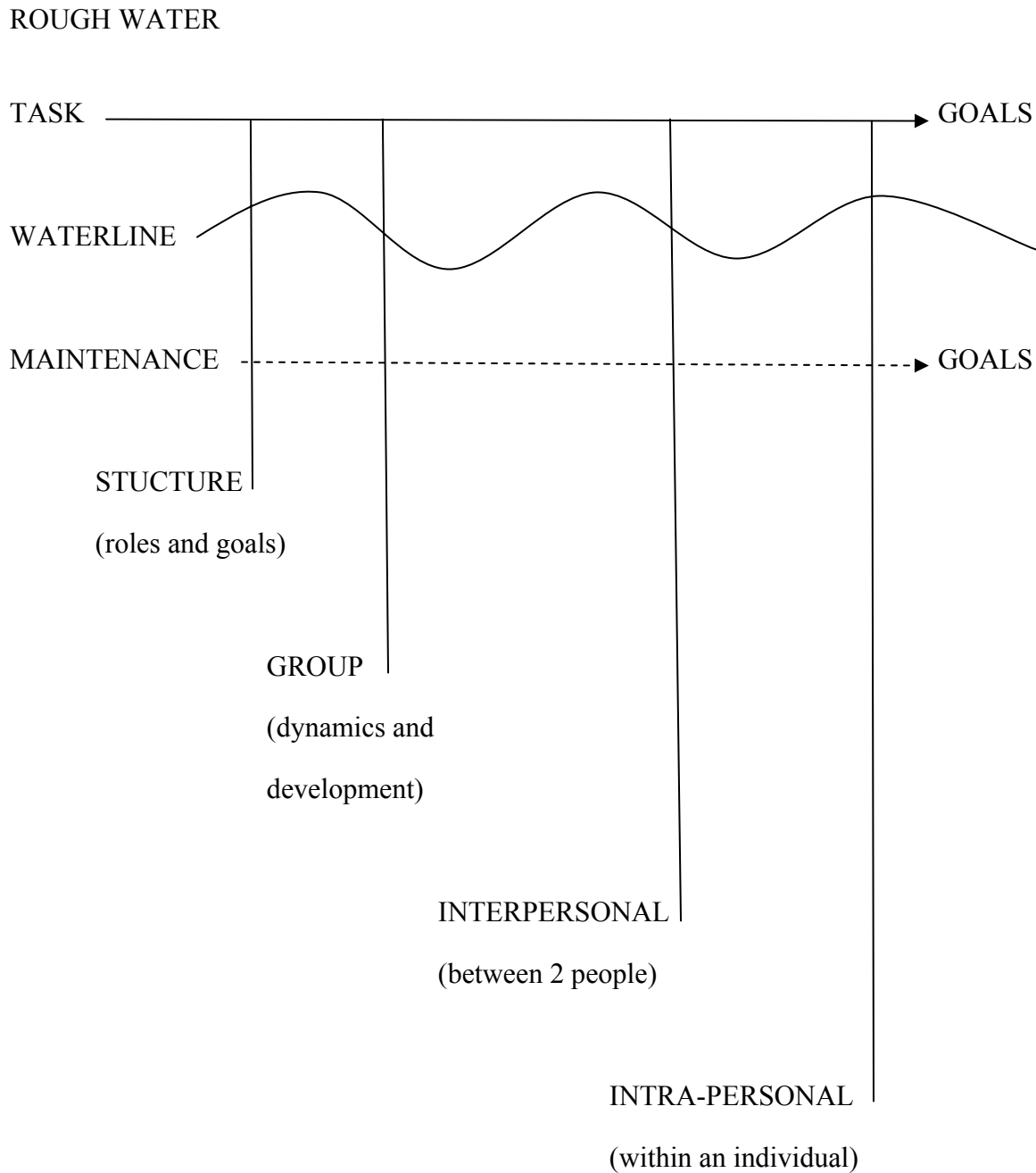
APPENDIX E

Communication Styles (Snively, W. B., & McNeill, J. D., 2008)



APPENDIX F

Waterline Model (Harrison, 1970)



Paying attention to the group's maintenance issues is intended to serve two goals:

- Accomplishment of tasks; and
- Enhancement of the work relationships of group members

APPENDIX G

Time Spent on Project

Proposed Timeline of Project

| STEPS OF ACTION RESEARCH | ACTIVITIES | WHEN | # OF HOURS |
|-------------------------------------|---|-----------|------------|
| Entry and Contracting | <ul style="list-style-type: none"> • Joining • Defining Agreements and Goals | September | 5 Hours |
| Data Gathering/ Collecting | <ul style="list-style-type: none"> • Interview team leads and staff • Check for sponsor buy-in with data collection strategy. • Implement data collection strategy | November | 10 Hours |
| Data Analysis | <ul style="list-style-type: none"> • Review, organize, and summarize data | November | 4.5 Hours |
| Data Feedback | <ul style="list-style-type: none"> • Present data to sponsor • Data feedback meeting with team leaders and sponsor. • Update goals, if needed, • Jointly diagnose issues and determine priorities/actions for the project • Establish measurement for updated goals, if necessary. | November | 4.5 Hours |
| Problem Solving/ Action Planning | <ul style="list-style-type: none"> • Facilitate an action planning process • Coaching sponsor on how the process will work and her role | December | 6 Hours |
| Intervention | <ul style="list-style-type: none"> • To be determined based upon data and planning • A “pre” and “post” written questionnaire will be utilized for all the goals. | December | 8 Hours |
| Evaluation and Closure | <ul style="list-style-type: none"> • Administer post Likert scale test to determine if there were significant changes. • Meet with sponsor for a de-briefing session to discuss the goals and results | January | 4 Hours |
| | TOTAL HOURS | ----- | 42 Hours |

Actual Time Spent on the Project

| STEPS OF ACTION RESEARCH | ACTIVITIES | WHEN | # OF HOURS |
|---------------------------------|--|------------------------------|------------|
| Entry and Contracting | <ul style="list-style-type: none"> • Joining • Defining agreements and goals | August | 3.5 Hours |
| Data Gathering/Collecting | <ul style="list-style-type: none"> • Check for sponsor buy-in with data collection strategy. • Administer data gathering survey • Interview entire team individually | September, October, November | 18.5 Hours |
| Data Analysis | <ul style="list-style-type: none"> • Review, organize, and summarize data | December | 4 Hours |
| Data Feedback | <ul style="list-style-type: none"> • Present data to sponsor • Data feedback meeting with entire team and sponsor • Update goals, if necessary • Jointly diagnose issues and determine priorities/actions for the project • Establish measurement for updated goals, if necessary | December & January | 6 Hours |
| Problem Solving/Action Planning | <ul style="list-style-type: none"> • Facilitate an action planning process • Coach sponsor on how the process will work and her role | December & January | 2.5 Hours |
| Intervention | <ul style="list-style-type: none"> • A “pre” and “post” written questionnaire will be utilized for all the goals • Vision Workshop • Preparation for Implementation Meeting • Decision Making & Communication Skills training | January & March | 18.5 Hours |
| Evaluation and Closure | <ul style="list-style-type: none"> • Evaluate post Likert scale test to determine if there were significant changes • Meet with sponsor for a de-briefing session to discuss the goals and results | March | 2 Hours |
| | TOTAL HOURS | ----- | 55 Hours |

APPENDIX H

Action – Research Project Defined

An Action-Research Survey Feedback process involves the collective, self-reflective inquiry of participants in a given situation on what would improve their practices, while developing understanding of both the situation and their practices. It is research with and for people rather than on people and might be characterized as cycles of “look, think, act”. There is a dual commitment in Action-Research to study a system and concurrently collaborate with members of the system in changing it in what is regarded as a desirable direction. Accomplishing this twin goal requires the active collaboration of the consultant and the client, and thus stresses the importance of co-learning as a primary aspect of the process. What separates this type of process from general professional practices, consulting, or daily problem-solving is the emphasis on studying the situation systemically, and ensuring that recommendations are informed by theoretical considerations.

The first step in our working relationship is to get a clear picture of what is actually going on and the only way to do that effectively is to collect data. It is impossible to plan without knowing first. Therefore we need to become co-learners in order to become co-owners of the project. Once we have an understanding of what the issue is, then we can begin to strategize about what to do about it in a productive and collaborative way. I can promise that as your consultant I will be able to contribute the latest theories and research in order to provide you with what is current, useful and true regarding human behavior in organizations. I also will have pro consultation meetings throughout the project that will provide me with additional feedback, professional advice and

multiple perspectives to approach the situation we decide to address. Finally, I will be collecting data at the end of the project to make sure that there are measurable results at the conclusion of our work together.

This project and working relationship is not for the faint of heart and should not be perceived as a quick fix solution. There needs to be a strong and mutual commitment from the client and consultant in order to see the project through to the end. There is an opportunity for the client to experience consulting differently and learn from their experience so that they and their team can build their capacity for self-management. In terms of time commitments the project will entail up to eight months and at least forty hours. The client has to be committed to the project and willing to support it throughout the duration in order to have all the steps of Action-Research completed and for the project to be successful. The following Letter of Introduction will provide further specifics about the process and the required commitments necessary for a successful engagement. I hope that you find them useful and I look forward to exploring this opportunity with you further.

APPENDIX I

Letter of Introduction

I, George Brewster, am offering a thesis project, which is a planned and facilitated learning and change project within an organization. Working in the practitioner role as a consultant and / or facilitator, I collaborate with a client group to take action on some significant problem or issue they are experiencing. Working together with the sponsor and their client group, my goal will be to learn about the issue with them in order to effectively facilitate change in some substantial way(s) so that the client group can achieve its goals. Along with setting and working toward these goals, ways of qualitatively and quantitatively measuring progress toward the desired outcomes must be established.

The purposes of the thesis project are:

1. To provide real and meaningful service to a client group; and,
2. To provide a substantial learning opportunity for the practitioner to apply the knowledge and skills learned as an Applied Behavioral Scientist to that client group.
3. To provide a consulting project that is a significant piece of academic and practitioner work for the student involving the Action-Research method and involving at least 40 hours of client contact through all phases of the work.

The phases and estimated timeline include the following:

1. Identifying the sponsor (decision-making authority) and client group: Clarify relationships with the sponsor, client group and practitioner. (June & July)
2. Entry and Contracting: Clarify and agree to initial contract with the sponsor, including preliminary goals and ways of measuring achievement. The precise goals or outcomes and methods emerge from blending the sponsor's goals, the practitioner's talents, and the staff concerns. (August)
3. Data gathering and analysis: Practitioner and sponsor establish method(s) of gathering information about the client group and their needs and specific change goals regarding the overall goals of the project and then factor those needs and goals into the work. (September)
4. Feedback and joint diagnosis: The practitioner develops ways to share information gathered with the sponsor and the client group and work with them to identify their interpretation of the data and to determine priorities for this particular project. (October)
5. Joint goal setting and action planning: The practitioner works with the sponsor to determine specific change goals and to review the approach to be used on working with the client group to meet the goals as established. (November)
6. Implementation: The practitioner works with the client system in any number of ways to meet the identified goals: for example, process consultation, problem solving, conflict resolution, training, team-building, and / or organizational transformation. (December)

7. Evaluation of goal attainment: Using the measurement schemes developed earlier, the practitioner must assess the changes accomplished, and not accomplished, during the project. (January)

Requirements of the thesis project sponsor /client:

1. Access to the key people that have a part in the problem the practitioner is being asked to address.
2. Enough time to do the job professionally.
3. An agreement that the practitioner will not be asked to evaluate the performance of the people who will be involved in the project.
4. Consideration of a trade, nominal fee, or future referrals for services rendered.
5. The commitment of the sponsor of the thesis project to proceed with the project.
6. Return phone calls and respond to e-mails.
7. Access to relevant documents and records as needed.
8. Willingness to collaborate.
9. Client group must have a minimum of 3 members.

Requirements of the consultant:

1. Be available to the work team.
2. Work collaboratively with the team.
3. Return phone calls and respond to e-mails.
4. Provide services toward meeting the primary goals.
5. Establish a collaborative relationship.
6. Address problems to produce a substantial change; and

7. Assure attention is given both to the business / technical problem and the relationship.
8. Maintain confidentiality as agreed upon by the sponsor and the consultant.

Consultant Credentials:

1. Seven plus years experience in consultative sales, marketing and operations in the financial services and technology / software related industries.
2. Current consulting practice focusing on strategic planning and executive coaching.
3. Team building awareness through coaching and playing competitive team sports.
4. Current student at the Leadership Institute of Seattle (LIOS) / Bastyr University earning candidacy towards a Master of Art's in Applied Behavioral Science with an emphasis in Consulting and Coaching Organizations.
5. Formerly NASD series 7, 63 and 65 licensed.

APPENDIX J

Data Gathering Survey (Crosby, 1996)

Please score the following statements using the scale below, write whole numbers for each. No written comments please. The answers you provide will remain confidential. The goal is to learn about the salon through your experience of it, and use the information you provide in order to collectively improve the boutique. Therefore, your honesty is appreciated and encouraged in order to help the collaborative process.

Name

Role / Job

Department

Scale:

| Almost always | Usually | Sometimes | Occasionally | Almost Never |
|------------------|---------|-----------|--------------|-----------------|
| 5 | 4 | 3 | 2 | 1 |

1. The following statements are concerning your personal goals:

- a. You know how to achieve your goals _____
- b. You are aware of your Daily goals _____
- c. You are aware of your Weekly goals _____
- d. You are aware of your progress towards reaching your goals _____
- e. You believe your goals are achievable _____
- f. You determine your own goals _____
- g. Someone else determines your goals _____
- h. You enjoy setting goals _____
- i. You consider your goals to be fair in relationship to those of your teammates _____
- j. You understand the reasons why certain individual's goals are different _____
- k. You are recognized when you achieve your goals _____
- l. You understand why your goals are what they are _____

2. The following statements are concerning your department's goals:

- a. You know how to contribute to your department's goals _____
 - b. You are aware of your department's progress towards reaching it's goals _____
 - c. You believe your department's goals are achievable _____
 - d. You help determine your department's goals _____
 - e. Someone else determines your department's goals _____
 - f. You consider your department's goals fair in relationship to other department's goals _____
 - g. You understand the reasons why certain department's goals are different _____
 - h. You are recognized when your department achieves it's goals _____
 - i. You understand why the department goals are what they are _____
3. **The following statements are concerning the salon goals:**
- a. You know how to contribute to the salon goals _____
 - b. You are aware of salon's progress towards reaching it's goals _____
 - c. You believe the salon goals are achievable _____
 - d. You help determine the salon goals _____
 - e. Someone else determines the salon goals _____
 - f. You are recognized when the salon achieves it's goals _____
 - g. You understand why the salon goals are what they are _____
 - h. You know the larger picture, i.e., where the salon is headed _____
4. **The following statements are concerning the roles at the salon:**
- a. You know exactly what to do and your expectations for your role are clear _____
 - b. You know who your team lead is _____
 - c. You know who to talk to regarding questions about products _____
 - d. You know who to talk to regarding questions about clients _____
 - e. You know who to talk to regarding suggestions _____
 - f. You know who to talk to regarding your frustrations or concerns _____
 - g. You know the difference between the team lead's role and Angela's role _____
 - h. You know the difference between the team lead's role and Rosalind's role _____
 - i. You know the difference between Angela's and Rosalind's roles _____
 - j. You understand Kira's role at the salon _____
5. **The following statements are concerning behaviors at the salon:**
- a. Information flows freely and accurately so that problems are identified in a timely fashion. _____
 - b. Disagreements are viewed as opportunities for dialogue and are dealt with directly. _____
 - c. Concerns get addressed in a reasonable amount of time and you receive the kind of support you need. _____

- d.** Managers are clear about the distinction between “who is deciding” versus “who is influencing” and communicate that. _____
- e.** Decisions are made in an expedient amount of time; it does not take forever to get a decision made. _____
- f.** Once decisions are made, they are effectively implemented in a timely way _____
- g.** Our meetings are effective. Time is not wasted. Appropriate people attend. Participation is shared. When needed, we solve issues and decisions are made. _____
- h.** New ideas for improving work processes, products and communication are encouraged. It is easy in our climate to suggest or try something new _____
- i.** We are able to get the resources we need to do our jobs well. These include information, equipment, tools and support. _____
- j.** When a manager or team lead is unhappy with our work, they tell us as soon as possible, privately. The feedback is clear and very specific (about the task or work) and not accusatory, judgmental or vindictive. _____
- k.** Work relationships are maintained. When two or more people disagree, the issue is dealt with directly and effectively – rather than being avoided or escalated. _____

Note. Based on work by John Scherer, Robert P. Crosby, and Ron Short. Published in: Crosby, R.P. (1996). The high-performance factors inventory: Assessing work-group management and practices. The 1996 Annual: Volume 2, Consulting. 175-195. San Diego, CA: Pfeiffer.

APPENDIX K

Data Gathering Survey

Averages

| Scale: 5 = Almost always, 4 = Usually, 3 = Sometimes, 2 = Occasionally, 1 = Almost Never | | | |
|--|--------------|-------------------|---------|
| Questions | Total Scores | Number of Answers | Average |
| The following statements are concerning your personal goals: | | | |
| You know how to achieve your goals | 62 | 15 | 4.13 |
| You are aware of your Daily goals | 60 | 15 | 4.00 |
| You are aware of your Weekly goals | 58 | 15 | 3.87 |
| You are aware of your progress towards reaching your goals | 59 | 15 | 3.93 |
| You believe your goals are achievable | 58.5 | 15 | 3.90 |
| You determine your own goals | 53 | 14 | 3.79 |
| Someone else determines your goals | 40 | 14 | 2.86 |
| You enjoy setting goals | 57 | 16 | 3.56 |
| You consider your goals to be fair in relationship to those of your teammates | 51 | 14 | 3.64 |
| You understand the reasons why certain individual's goals are different | 62 | 15 | 4.13 |
| You are recognized when you achieve your goals | 66.5 | 16 | 4.16 |
| You understand why your goals are what they are | 58 | 14 | 4.14 |
| The following statements are concerning your department's goals: | | | |
| You know how to contribute to your department's goals | 64 | 15 | 4.27 |
| You are aware of your department's progress towards reaching it's goals | 56 | 15 | 3.73 |
| You believe your department's goals are achievable | 54 | 15 | 3.60 |
| You help determine your department's goals | 35 | 16 | 2.19 |
| Someone else determines your department's goals | 66 | 16 | 4.13 |
| You consider your department's goals fair in relationship to other department's goals | 57 | 15 | 3.80 |
| You understand the reasons why certain department's goals are different | 60 | 15 | 4.00 |
| You are recognized when your department achieves it's goals | 60.5 | 15 | 4.03 |
| You understand why the department goals are what they are | 53 | 15 | 3.53 |
| The following statements are concerning the salon goals: | | | |
| You know how to contribute to the salon goals | 61 | 15 | 4.07 |
| You are aware of salon's progress towards reaching it's goals | 59 | 16 | 3.69 |
| You believe the salon goals are achievable | 54 | 15 | 3.60 |
| You help determine the salon goals | 29 | 16 | 1.81 |
| Someone else determines the salon goals | 72 | 16 | 4.50 |
| You are recognized when the salon achieves it's goals | 54 | 15 | 3.60 |
| You understand why the salon goals are what they are | 52 | 16 | 3.25 |
| You know the larger picture, i.e., where the salon is headed | 52 | 15 | 3.47 |

| | | | |
|---|------|----|--------|
| The following statements are concerning the roles at the salon: | | | |
| You know exactly what to do and your expectations for your role are clear | 59 | 15 | 3.93 |
| You know who your team lead is | 74 | 16 | 4.63 |
| You know who to talk to regarding questions about products | 57 | 16 | 3.56 |
| You know who to talk to regarding questions about clients | 63 | 16 | 3.94 |
| You know who to talk to regarding suggestions | 56 | 16 | 3.50 |
| You know who to talk to regarding your frustrations or concerns | 56 | 16 | 3.50 |
| You know the difference between the team lead's role and Angela's role | 65 | 16 | 4.06 |
| You know the difference between the team lead's role and Rosalind's role | 55 | 16 | 3.44 |
| You know the difference between Angela's and Rosalind's roles | 49 | 16 | 3.06 |
| You understand Kira's role at the salon | 41 | 16 | 2.56 |
| The following statements are concerning behaviors at the salon: | | | |
| Information flows freely and accurately so that problems are identified in a timely fashion. | 42 | 15 | 2.80 |
| Disagreements are viewed as opportunities for dialogue and are dealt with directly. | 46 | 15 | 3.07 |
| Concerns get addressed in a reasonable amount of time and you receive the kind of support you need. | 50 | 15 | 3.33 |
| Managers are clear about the distinction between "who is deciding" versus "who is influencing" and communicate that. | 42 | 15 | 2.80 |
| Decisions are made in an expedient amount of time; it does not take forever to get a decision made. | 52 | 16 | 3.25 |
| Once decisions are made, they are effectively implemented in a timely way | 52.5 | 15 | 3.50 |
| Our meetings are effective. Time is not wasted. Appropriate people attend. Participation is shared. When needed, we solve issues and decisions are made. | 63.5 | 16 | 3.97 |
| New ideas for improving work processes, products and communication are encouraged. It is easy in our climate to suggest or try something new | 56.5 | 16 | 3.53 |
| We are able to get the resources we need to do our jobs well. These include information, equipment, tools and support. | 50 | 16 | 3.13 |
| When a manager or team lead is unhappy with our work, they tell us as soon as possible, privately. The feedback is clear and very specific (about the task or work) and not accusatory, judgmental or vindictive. | 57 | 15 | 3.80 |
| Work relationships are maintained. When two or more people disagree, the issue is dealt with directly and effectively – rather than being avoided or escalated. | 47.5 | 16 | 2.97 |
| Totals | | | 179.70 |
| Average Score (total Divided by 50 questions) | | | 3.59 |

Note. The numbers in red represent the 10 lowest average response scores, which signified areas for improvement and focus based upon the Likert scale answers.

APPENDIX L

Data Collection Interview Results

- A) Positive Feedback:
- a. Everyone likes the people that work at the salon
 - i. Very talented and professional
 - b. Agreement on what the salon is trying to be
 - i. Client driven upscale salon but not pretentious
 - c. Respect for Angelina
- B) Goals:
- a. “Goals are not the issue here.”
 - b. How are they made at the team and salon level?
 - c. Desire to have more ownership and participation in making them. “Goals are out of alignment in terms of realistic expectations.” “Goals are not realistic.”
 - d. Desire to better understand how they are created. “Goals seem to be arbitrary.”
 - e. “Don’t like having them posted all over the place.”
 - f. “The bar keeps getting raised, never good enough, no time to rest or celebrate.”
- C) Roles:
- a. Angelina’s availability = “She is so busy I do want to disturb her.”
 - i. Communicate by e-mail, not everyone does
 - ii. The complexity of dual roles = the top producer and the owner
 - b. Roz = “No industry experience, makes her different than the rest. Angelina’s Bad Guy.”
 - c. Kira = “What does she do? How can I use her?”
 - d. Overall Management = Most people go to Angelina if they need to. “Management structure is as clear as mud.” “How does what and how do we access them?” “Who is in charge of the ship?”
 - e. “Team Leads meeting is informal and unscheduled.”
- D) Us versus Them Division in Groups
- a. Artists versus Business / Structure versus Freedom = “I feel like I am treated like I am 5 years old.” “I feel like a little kid that is 12 years old.”
 - b. Management versus Employees = “What does the company provide for us versus what we need to provide for ourselves.”
 - c. Front Desk versus Employees = “The Police squad monitors us.”
 - d. Skin Team versus Hair Team = “The skin team gets anything they want.”
 - e. Leasers versus Commission = Frustration in both directions regarding the different arrangement
- E) Timing and reliability = “Don’t like having to be there when it is slow.”

- a. Changing the schedule around = My experience
- b. Changing locations = My experience
- c. Interview times were all over the place = My experience

F) Overall Environment

- a. "It could be a lot warmer" "Environment is horrible." "Feels Cold not Warm."
- b. "Attitudes are miserable."
- c. "Where is the salon headed?" Lots of potential, not sure where it is headed."
- d. "Music is an issue, it is too loud, too quiet, or I don't like what is playing."
- e. "Just need to know what to do."
- f. "This is my house and I want everything to be ok, no anger or frustration."
- g. "Like parents, decisions are made and handed down."
- h. "Teacher/Student relationship versus collaboration."
- i. "More Time as a team to discuss issues."

APPENDIX M

Themes of Data for Feedback Meeting

1) Personnel

- Generally Expressed Satisfaction
- Talented and Professional

2) Decision Making

- Department Goals
 - “You help determine department goals = 2.35 Avg. Survey Score
(5 = Almost Always/ 1 Almost Never)
- Salon Goals
 - “You help determine salon goals = 2.00 Avg. Survey Score
- “Managers are clear about the distinction between who is deciding versus who is influencing and communicate that.” = 2.88 Avg. Survey Score

3) Posting of Goals

- Generally Expressed Dissatisfaction

4) Recognition and Celebration

5) Lack of faith in the ability of Roz to relate to our industry

6) Lack of access to Angelina when it is needed

7) Lack of knowledge of how to use Kira to help me in my job

- “You understand Kira’s role at the salon = 2.59 Avg. Survey Score

8) Lack of consistency in how department leads are used

9) “Us versus Them”

- Artists versus Business

- Management versus Employees
- Front Desk versus Floor
- Skin versus Hair
- Leasers versus Commission

10) Quid Pro Quo = “This for That”

- “What does the company provide for us?”

Versus

- “What do we need to provide for ourselves and the company?”

11) Overall Environment

- Is not warm and comfortable
- “Information flows freely and accurately so problems are identified in a timely fashion = 2.81 Avg. Survey Score
- “When 2 people disagree the issue is dealt with directly and effectively rather than avoided or escalated = 2.97 Avg. Survey Score

12) Work Schedules

- Structure versus Freedom

13) Music Choice

14) Future of the Salon

APPENDIX N

Data Feedback Meeting Agenda

January 9th at 9AM to 11AM at Red

- 1) Review today's Agenda and Goals for the meeting: George – 5 Minutes
 - A) Agenda Flip Chart
 - B) Goals Flip Chart
 - a. To have an open and honest discussion around the themes from the surveys and interviews
 - b. Collectively prioritize items to work on and determine next steps
- 2) Review the initial Project Goals: Angelina – 5 Minutes
 - A) To raise the overall production of the salon
 - a. Determine the clarity of goal expectations
 - b. Determine the clarity of roles
 - c. Increase management team's communication abilities
- 3) Group Activity: George – 5 Minutes
 - A) Move everyone from upstairs to downstairs
- 4) Ground rules for the meeting today: George – 5 Minutes
 - A) Suspend all judgments
 - a. Judgments of other's comments
 - b. Judgments of yourself
 - B) Use "I" statements to describe your thoughts and feelings
- 5) Angelina and Roz opening remarks, hopes, expectations – 5 Minutes
- 6) Data Feedback Discussion: George – 55 Minutes
 - A) Share all of the themes with the group
 - B) Make sure they are clear on all of the themes
 - C) Check to see if they think any overlap
 - D) Let them discuss the ones they want to
- 7) Check in with the group to see how this is going: George – 5 Minutes
- 8) Pick the 3 themes you have the most energy around and have the most control over changing: George – 5 Minutes
- 9) Brainstorm activity: George – 20 Minutes
 - A) Create S.M.A.R.T Goals for the 3 themes
- 10) Decide Next Steps: George – 5 Minutes

- A) What are they?
- B) Who is involved in next steps?
- C) Where and When do they occur?

11) Closure: George – 5 Minutes

APPENDIX O

Vision Questionnaire Results

Question 1 = I understand Brightly Colored Boutique's (BCB) vision

Question 2 = I feel I was a part of making BCB's vision

Questions were answered on a Likert Scale in which 1 = Not at all, 3 = Somewhat and 5 = Completely.

| | Question 1 | Question 2 |
|------------------------------|-------------------|------------|
| Participant responses | 4 | 5 |
| | 2 | 2 |
| | 5 | 2 |
| | 2 | 2 |
| | 3 | 2 |
| | 3 | 2 |
| | 3 | 1 |
| | 3 | 3 |
| | 2 | 2 |
| | 2 | 3 |
| | 3.5 | 5 |
| | 3 | 3 |
| | Avg. Score | 2.96 |
| Range | 2 - 5 | 1 - 5 |

APPENDIX P

Theme Prioritization

| Number | Data Theme | Group 1 Rank | Adjusted * 7 | Group 2 Rank | Adjusted * 9 | Total Score |
|--------|--|--------------|--------------|--------------|--------------|-------------|
| 1 | Future of the salon | 1 | 7 | 2 | 18 | 25 |
| 2 | Department Goals = "you determine department goals" = | 11 | 77 | 1 | 9 | 86 |
| 3 | Work Schedules = Structure vs. freedom | 7 | 49 | 5 | 45 | 94 |
| 4 | artists vs. business | 9 | 63 | 4 | 36 | 99 |
| 5 | Decision Making = "Managers are clear about the distinction between who is deciding versus who is influencing and communicate that." = 2.88 Avg. score | 3 | 21 | 10 | 90 | 111 |
| 6 | Front Desk vs. Floor Staff | 2 | 14 | 11 | 99 | 113 |
| 7 | Information flows freely and accurately so that problems are identified in a timely fashion." = 2.81 | 5 | 35 | 9 | 81 | 116 |
| 8 | Lack of access to Angela when it is needed | 6 | 42 | 10 | 90 | 132 |
| 9 | "When two people disagree the issue is dealt with directly and effectively rather than avoided and escalated" = 2.97 | 10 | 70 | 7 | 63 | 133 |
| 10 | Posting of goals - generally expressed dissatisfaction | 20 | 140 | 2 | 18 | 158 |
| 11 | "This for that" = what does the company provide for us vs. what do we need provide for ourselves and the company? | 4 | 28 | 17 | 153 | 181 |
| 12 | Salon Goals = "You help determine the salon goals" = | 13 | 91 | 10 | 90 | 181 |
| 13 | Lack of Consistency in how department leads are used | 19 | 133 | 6 | 54 | 187 |
| 14 | Recognition and celebration | 17 | 119 | 8 | 72 | 191 |
| 15 | Management vs. employees | 8 | 56 | 16 | 144 | 200 |
| 16 | Skin vs. hair | 14 | 98 | 14 | 126 | 224 |
| 17 | Lease vs. commission | 16 | 112 | 15 | 135 | 247 |
| 18 | Environment is not warm and cozy | 14 | 98 | 18 | 162 | 260 |
| 19 | Lack of faith in Roz to relate to our industry | 12 | 84 | 20 | 180 | 264 |
| 20 | Music Choice | 18 | 126 | 19 | 171 | 297 |
| 21 | Kira = You understand Kira's role at the salon | 21 | 147 | 21 | 189 | 336 |

Scores were compiled by May in two different groups, thus the groups of 7 and 9. This was done because the group of 7 used numbers to prioritize the themes while the other group of 9 used other ways. Each group's were weighed to establish an overall ranking of the themes. If there was a tie between two themes both got the same score and the following number was skipped. For example, group 2 had a tie for the # 2 ranking, therefore there are 2 number 2 rankings and no number 3 ranking in that column. There are a total of 21 themes that were considered for this exercise. The lower the total score the more important the theme is according to this prioritization.

APPENDIX Q

Intervention Recommendation

Two separate trainings, ideally in one full day together, or in two shorter duration meetings that are not very far apart. Probably no more than two to three weeks.

A) Training #1: Decision Making

- Teach decision making styles to the group
- Get everyone familiar with various options and on the same page
 - Tell, Sell, Consult, Joint (Majority / Consensus) Delegate
- Control and Input by Leader Versus Group
- Build Knowledge to increase Flexibility, Choices and Reasons for using them
- Information = Do you have all of the information you need to make the decision?
- Buy In / Commitment = Do you have 100% buy in to this decision?
- Time = The most often used excuse
- Use the new skills to make decisions on some of the data themes
- IE. The posting of the goals, the vision statement, Team Leads, etc.

B) Training #2: Team Development through Improved Communication Skills

- Introduce a 4 quadrant exercise to determine differences within the group
- Have people score themselves to determine their qualities

- Have people of different styles spend time discussing their needs for communication going forward
- Chart everyone on a large quadrant to map where they are
- Look at and discuss the implications of the distribution to the workings of Red
- Establish ground rules or agreements around the use of the information going forward

The goal of the trainings is to develop skills that the team and the leadership can use going forward to tackle the issues that have been raised in the data themes as well as future issues that may arise. These skills and information will ultimately allow for the team to be more effective and efficient, which should lead to increased production and a healthier team atmosphere.

A pre and post training questionnaire will be administered to measure the change in the teams understanding of decision making processes, the diversity among the team and the implications of those differences.

APPENDIX R

Kira Communications

From: KIRA

Sent: Monday, February 27, 2006 11:20 PM

To: Brewster, George

Subject: Hello!

Dear George:

First of all, thank you so much for returning my call so promptly--I really appreciate it. Second, I am so sorry to be bugging you--I do know that you're busy with a million and one things and I hate to add to your burden; however, I need to ask you a favor.

When I was laid off from RED in December I filed for unemployment. Angela fought it, saying that I "quit voluntarily" and wasn't laid off. We each wrote our version of what happened IN that fateful meeting, and the Unemployment Security Commission sided me with me and granted my unemployment wages. Angela has now appealed that decision, which means a court hearing on the 15th of March. I've had to hire a lawyer to represent me in this hearing, so you can imagine the utter DELIGHT this has been. In Angela's appeal, she changed her tune a little bit, stating that, had I not quit, I deserved to be fired for my "misconduct" and "negligence in deliberately harming RED and its business." This is where you come in:

My lawyer has suggested that it would be great for me if you would be willing to either submit the results of the interviews you did with the staff at RED,

or write a statement saying that I was NOT reviled and mistrusted by my fellow employees. This is completely embarrassing and horrible to ask of you, and I do so only because Rosalind gave me reason to believe that perhaps there were some favorable comments, made by the staff, concerning my performance at RED. My lawyer thought that, should Angela start in with a character assassination, it might be nice to show that the employees were of a different mind.

I so don't want to put you in the middle of this, George, at ALL. You've been so completely wonderful to everyone and so generous with your time and it makes me just a little ill to ask you for this. I don't know if a statement just outlining the themes of the interviews, inasmuch as they pertain to me, puts you smack-dab in the center of this. . . ? . . . If you COULD write a statement, stating nothing against Angela or RED, but rather reiterating what the employees said about me (if it WAS "favorable"--Rosalind wasn't just blowing smoke, was she, because how embarrassing would THAT be?), I can't even tell you how much I'd appreciate it.

I also want you to know that I completely understand if you don't feel comfortable doing this--I'm just exploring all my avenues before this court hearing. If you've got questions, PLEASE don't hesitate to let me know. You've got my email address now--which might be the easiest way since I start my new job at UW on Wednesday. It's in the Human Resources Department and I'd be completely excited about it. . . if it weren't for the 8:00 a.m. start time! I haven't had a job start that early in my entire LIFE. Oh, wish me luck--'cause all the

coffee in the WORLD. . . but it'll be great to be working again so I'm not complaining.

I hope everything is going well with you. Again, I'm sorry to have to bother you with this--I asked my lawyer if I couldn't just appear at the hearing and say, "What kind of IDIOT would 'voluntarily quit' a job ONE WEEK before Christmas with nothing else lined up? I rest my case." She didn't think that was the BEST strategy. . .

So thank you again so much, and I'll talk to you soon!

Sincerely,

Kira

3/2/06:

Dear George:

I completely understand your position--I just had to give it the ol' "college try," as it were. I really, again, appreciate your even considering it, and I'll let you know how this all pans out!

Kira

----- Original message -----

From: "Brewster, George" <george.brewster@wamu.net>

Kira,

My apologies for the delay in my response, as you mentioned I have been and continue to be extremely busy. It is hard for me to hear about the challenges you have

faced since the end of your time at Red, but I am really happy you have found work at UW in Human Resources. Sounds like yesterday was your first day, how did it go?

I have given thought to your request and need to remind you of the confidential nature of my work with the salon. As you recall we strongly emphasized the confidentiality of the surveys and interviews. My job is to collect data (qualitative and quantitative) and find the themes in data in order to give it back to the organization (Red) in generalities to work on. I believe writing any kind of statement regarding the surveys or interviews would be a breach of that confidentiality agreement I have in place with the employees of Red and therefore would be ethically unacceptable. I hope you can understand and respect that position.

As you spoke to, your request does put me squarely in the middle of your discussion and work with Angela. I spoke with her about it yesterday and told her my position and decision as I am telling you now. I feel for you and do not want you to think that I do not, given my response; however, my decision is that I cannot meet your request.

I wish you all the success at your new endeavor and appreciate your kind words in regards to our working relationship while you were at Red.

All the best,

George

APPENDIX S

Pre and Post Intervention Questionnaire

A) Decision Making Skills

- 1) How aware are you of the different decision making styles?
Not at all = 1 : 2 : 3 : 4 : 5 : 6 Completely
- 2) How aware are you of the strengths and weaknesses of the different decision making styles?
Not at all = 1 : 2 : 3 : 4 : 5 : 6 Completely
- 3) How aware are you of the criteria for decision making effectiveness?
Not at all = 1 : 2 : 3 : 4 : 5 : 6 Completely
- 4) How confident are you in your own decision making skills?
Not at all = 1 : 2 : 3 : 4 : 5 : 6 Completely
- 5) How confident are you in the group's decision making skills?
Not at all = 1 : 2 : 3 : 4 : 5 : 6 Completely

B) Communication Skills

- 1) How aware are you of different communication styles?
Not at all = 1 : 2 : 3 : 4 : 5 : 6 Completely
- 2) How aware are you of your own preferred communication style?
Not at all = 1 : 2 : 3 : 4 : 5 : 6 Completely
- 3) How aware are you of the skills necessary to effectively engage other communication styles than your own?
Not at all = 1 : 2 : 3 : 4 : 5 : 6 Completely
- 4) How confident are you in your own communication skills?
Not at all = 1 : 2 : 3 : 4 : 5 : 6 Completely
- 5) How confident are you in the group's communication skills?
Not at all = 1 : 2 : 3 : 4 : 5 : 6 Completely

C) Vision Statement

- 1) How well do you understand Red's current Vision?
Not at all = 1 : 2 : 3 : 4 : 5 Completely
- 2) How much do you feel you were a part of making Red's current Vision?
Not at all = 1 : 2 : 3 : 4 : 5 Completely

Additional comments on today's meeting

APPENDIX T

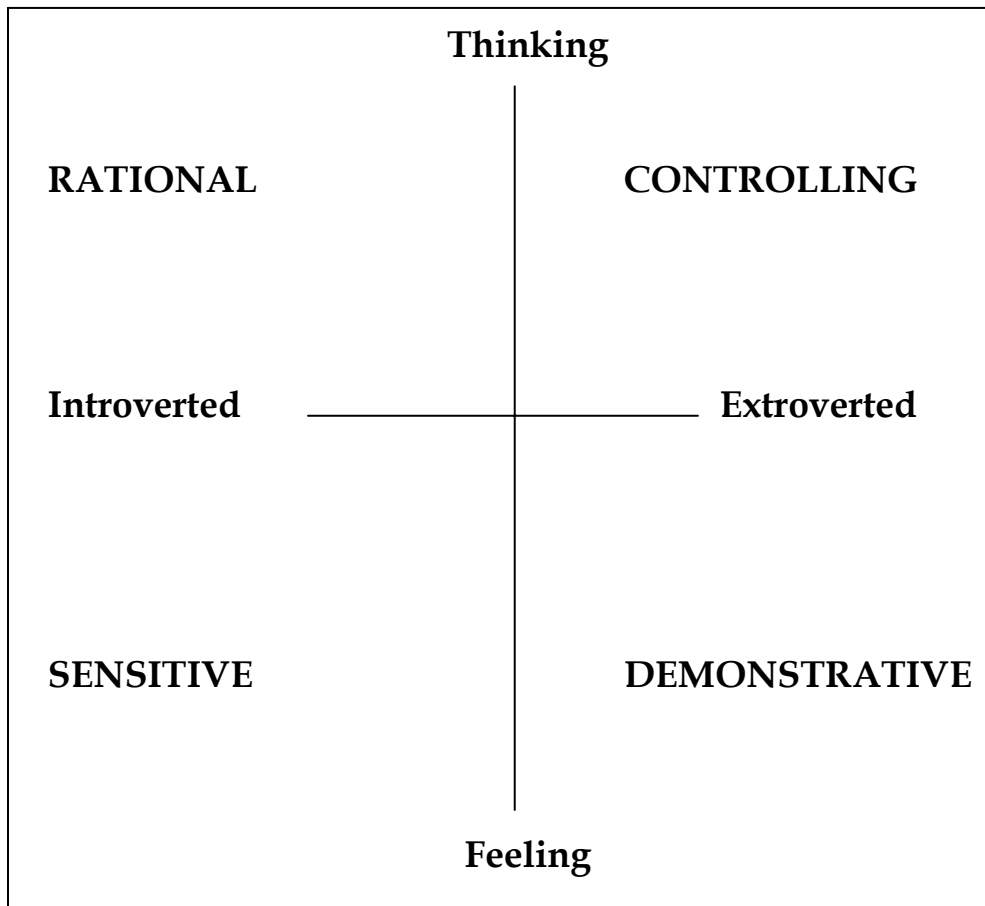
M & M Exercise Questionnaire (Johnson, D.W. & Johnson, F.P, 2003)

Please record your answers to the following questions. Then hand the paper to the recorder in your group.

- 1) How well do you feel your group understood and listened to you?
Not at all = 1 : 2 : 3 : 4 : 5 : 6 : 7 : 8 : 9 = Completely
- 2) How much influence do you feel you had in your group's decision making?
None = 1 : 2 : 3 : 4 : 5 : 6 : 7 : 8 : 9 = A great deal
- 3) How committed do you feel to the decision your group made?
Very uncommitted = 1 : 2 : 3 : 4 : 5 : 6 : 7 : 8 : 9 = Very committed
- 4) How much responsibility do you feel for making the decision work?
None = 1 : 2 : 3 : 4 : 5 : 6 : 7 : 8 : 9 = A great deal
- 5) How satisfied do you feel with the amount and quality of your participation in your group's decision making?
Very dissatisfied = 1 : 2 : 3 : 4 : 5 : 6 : 7 : 8 : 9 = Very satisfied
- 6) Write one adjective that describes the atmosphere in your group during the decision making.

APPENDIX U

Modified Communication Styles (Zolno, 2005)



APPENDIX V

Pre and Post Intervention Questionnaire Results

Intervention Goals:

- 1) Improve Decision Making Skills
- 2) Improve Communication Skills

Summary of the Intervention Questionnaire Results:**Decision Making Skills**

1) How aware are you of the different decision making styles?

Not at all = 1 : 2 : 3 : 4 : 5 : 6 Completely

Pre Scores: 3, 4, 4, 5, 4, 5, 3, 3, 3, 3, 1, 2, 1, 3, 1, 4, 2,

Post Scores: 5, 5, 5, 5, 4, 6, 4, 5, 6, 6, 5, 6, 6, 6, 6, 6, 5, 4, 6, 6

| | <u>PRE</u> | <u>POST</u> |
|-----------|-------------|-------------|
| Average = | 3.00 | 5.35 |
| Range = | 1 through 5 | 4 through 6 |

2) How aware are you of the strengths and weaknesses of the different decision making styles?

Not at all = 1 : 2 : 3 : 4 : 5 : 6 Completely

Pre Scores: 2, 3, 4, 5, 4, 4, 3, 4, 3, 2, 1, 3, 1, 3, 1, 3, 1

Post Scores: 5, 5, 4, 5, 4, 6, 5, 5, 4, 6, 5, 6, 6, 6, 6, 6, 5, 5, 6, 6

| | <u>PRE</u> | <u>POST</u> |
|-----------|-------------|-------------|
| Average = | 2.76 | 5.30 |
| Range = | 1 through 5 | 4 through 6 |

3) How aware are you of the criteria for decision making effectiveness?

Not at all = 1 : 2 : 3 : 4 : 5 : 6 Completely

Pre Scores: 3, 3, 5, 4, 3, 5, 3, 3, 3, 2, 1, 2, 2, 3, 1, 1, 1

Post Scores: 2, 5, 5, 4, 5, 6, 5, 6, 5, 6, 4, 5, 6, 5, 5, 5, 5, 5, 6, 5

| | <u>PRE</u> | <u>POST</u> |
|-----------|-------------|-------------|
| Average = | 2.65 | 5.00 |
| Range = | 1 through 5 | 2 through 6 |

4) How confident are you in your own decision making skills?

Not at all = 1 : 2 : 3 : 4 : 5 : 6 Completely

Pre Scores: 5, 6, 6, 5, 5, 6, 5, 5, 5, 5, 1, 5, 4, 3, 6, 6, 5

Post Scores: 5, 5, 6, 5, 5, 6, 5, 6, 6, 6, 6, 6, 6, 6, 5, 6, 6, 4, 6, 6

| | <u>PRE</u> | <u>POST</u> |
|-----------|-------------|-------------|
| Average = | 4.88 | 5.60 |
| Range = | 1 through 6 | 4 through 6 |

5) How confident are you in the group's decision making skills?

Not at all = 1 : 2 : 3 : 4 : 5 : 6 Completely

Pre Scores: 4, 2.5, 2, 4, 5, 4, 2, 2, 5, 3, 1, 5, 5, 1, 1, 1, 5

Post Scores: 5, 5, 5, 4, 2, 6, 4, 4, 4, 6, 3, 6, 5, 4, 5, 6, 4, 3, 5, 5

| | <u>PRE</u> | <u>POST</u> |
|-----------|-------------|-------------|
| Average = | 3.09 | 4.55 |
| Range = | 1 through 5 | 2 through 6 |

Communication Skills

1) How aware are you of different communication styles?

Not at all = 1 : 2 : 3 : 4 : 5 : 6 Completely

Pre Scores: 4, 6, 4, 6, 3, 6, 4, 4, 4, 1, 5, 1, 3, 1, 5, 5
 Post Scores: 5, 5, 4, 4, 6, 6, 6, 6, 6, 6, 6, 6, 5, 6, 6, 4, 6, 6

| | <u>PRE</u> | <u>POST</u> |
|-----------|-------------|-------------|
| Average = | 3.88 | 5.53 |
| Range = | 1 through 6 | 4 through 6 |

2) How aware are you of your own preferred communication style?

Not at all = 1 : 2 : 3 : 4 : 5 : 6 Completely

Pre Scores: 4, 5, 6, 6, 3, 6, 5, 6, 6, 5, 1, 5, 2, 4, 6, 4, 4
 Post Scores: 5, 6, 5, 6, 6, 6, 6, 6, 5, 6, 6, 6, 5, 6, 6, 4, 6, 6

| | <u>PRE</u> | <u>POST</u> |
|-----------|-------------|-------------|
| Average = | 4.29 | 5.68 |
| Range = | 1 through 6 | 4 through 6 |

3) How aware are you of the skills necessary to effectively engage other communication styles than your own?

Not at all = 1 : 2 : 3 : 4 : 5 : 6 Completely

Pre Scores: 4, 3, 4, 6, 3, 5, 5, 3, 4, 4, 1, 4, 1, 4, 2, 2, 2
 Post Scores: 4, 5, 5, 6, 6, 6, 5, 5, 6, 4, 6, 6, 6, 5, 5, 4, 3, 5, 6

| | <u>PRE</u> | <u>POST</u> |
|-----------|-------------|-------------|
| Average = | 3.35 | 5.16 |
| Range = | 1 through 6 | 3 through 6 |

4) How confident are you in your own communication skills?

Not at all = 1 : 2 : 3 : 4 : 5 : 6 Completely

Pre Scores: 4, 6, 6, 6, 6, 5, 6, 5, 6, 5, 6, 5, 3, 4, 6, 5, 5
 Post Scores: 6, 6, 4, 6, 6, 6, 4, 6, 6, 5, 5, 6, 6, 5, 5, 6, 4, 5, 6

| | <u>PRE</u> | <u>POST</u> |
|-----------|-------------|-------------|
| Average = | 5.24 | 5.42 |
| Range = | 3 through 6 | 4 through 6 |

5) How confident are you in the group's communication skills?

Not at all = 1 : 2 : 3 : 4 : 5 : 6 Completely

Pre Scores: 4, 4, 4, 4, 4, 2, 2, 3, 3, 3, 1, 4, 5, 1, 1, 1, 4
 Post Scores: 5, 5, 5, 3, 6, 4, 3, 3, 6, 3, 5, 5, 5, 5, 3, 4, 3, 4, 6

| | <u>PRE</u> | <u>POST</u> |
|-----------|-------------|-------------|
| Average = | 2.94 | 4.37 |
| Range = | 1 through 5 | 3 through 6 |

Vision Statement

1) How well do you understand Red's current Vision?

Not at all = 1 : 2 : 3 : 4 : 5 Completely

Pre Scores: 4, 2, 5, 2, 3, 3, 3, 3, 2, 2, 3, 5, 3

Post Scores: 5, 5, 4, 5, 5, 5, 5, 4, 5, 5, 5, 5, 5, 4, 5, 4, 5, 5

| | <u>PRE</u> | <u>POST</u> |
|-----------|-------------|-------------|
| Average = | 2.96 | 4.79 |
| Range = | 2 through 5 | 4 through 5 |

2) How much do you feel you were a part of making Red's current Vision?

Not at all = 1 : 2 : 3 : 4 : 5 Completely

Pre Scores: 5, 2, 2, 2, 2, 2, 1, 3, 2, 3, 5, 3

Post Scores: 5, 5, 4, 3, 5, 1, 5, 4, 1, 4, 5, 5, 4, 4, 4, 1, 4, 3, 5

| | <u>PRE</u> | <u>POST</u> |
|-----------|-------------|-------------|
| Average = | 2.67 | 3.79 |
| Range = | 1 through 5 | 1 through 5 |

Comments

Great!

Very Informative, helpful and excellently organized. Thank u George!

La La La Di Da Do Wop Do Wop

I feel Red is going to be very successful and still need to continue with ongoing meeting pow wows

Break down of qualifiers between thinking and feeling is unbalanced

Remarkably we made it through on time. It felt thorough

I know what I need to do to communicate, its just learning to do it!

Thank you for your hard work on our behalf

Really enjoyed relating each person with their personality traits. I felt this was very helpful for communicational understanding and really fun!!

Words used to describe Autocratic decision making style:

Lonely, Lifeless, Helpless, Odd, Daunting

Words used to describe Autocratic with discussion decision making style:

Energetic, Confusion, Exciting, Alive, Focused

Words used to describe Majority vote decision making style:

Fun, Fun, Collaborative, Funny, Unified

Words used to describe Consensus decision making style:

Considerate, Compromise, Understanding, Productive, Fair

APPENDIX W

Angelina's Feedback

Here are some bullet points. Hope this is helpful. Hope all is well with you and that your thesis is materializing happily!

From beginning to end, you were respectful of our time and work by being: on time, sensitive, informative, and warm.

I don't remember if you mentioned your past work with teams, whether managing or working with? This would have been helpful, if you had woven your own experiences with teams into our conversations.

I might have reached the conclusions which the project brought out, on my own, however, it's hard to tell, since I wasn't on my own.:)

I wish you would have pushed me a little harder to focus on the team as a whole instead of individuals, even though we gleaned important information.

You did use the "water line" example to show me the value of individual versus team importance, but that seemed more like it was meant to be informative, whereas I would have appreciated it being more influential.

I felt "helped" more near the end, with the conversation about decision-making styles and the coaching around listening and slowing down and checking in for understanding. I sensed a greater confidence in you as a coach and teacher by that time.

You communicated with me via email very well. You always followed through on communications we talked about in prior meetings.

I enjoyed the more assertive George, which I saw in the final meeting. I felt like we needed an expert, and one to help us see things decidedly and to instruct a bit more, when things went astray from healthy ground rules and communication.

I didn't enjoy the feeling of being handled with "kid gloves," which I explained to you in our last meeting at Starbucks. I felt like there was a thin wall between us and didn't trust our relationship in the way that I need to in order to learn best. I think it takes a bigger risk to be assertive and it instills confidence in your client. This may be particular to me and my learning and communication style, though.

I enjoyed being a part of an experimental process and one which fostered your and our education. I would have paid full price, however, if you had independently "sold" me on your character and experience in the field. As a client, I would want to be told what measurable goals had been reached with prior clients.

I feel that, even though you tried and I tried, the fact that Rosalind was/is your friend, colored the experience. It made it more difficult to discuss important issues as related to her. This was unavoidable in our case, though.

Thank you very much, George, for your time and energy and for all that you helped us with! I know that everyone enjoyed meeting with you.

Take good care and I hope to see you around,

Angela

APPENDIX X

Goal 1: Vision Questionnaire Data

How well do you understand BCB's current vision questionnaire results

| WSRT DATA: AVG SCORE | PRE | POST | SIGN | DELTA | RAW RANK | AVE RANK | NEG. RANK | POS. RANK |
|----------------------|------|------|------|-------|----------|----------|-----------|-----------|
| Respondent #1 | 2.00 | 4.00 | + | 2.00 | 3 | 6 | | 6 |
| Respondent #2 | 2.00 | 4.00 | + | 2.00 | 4 | 6 | | 6 |
| Respondent #3 | 2.00 | 5.00 | + | 3.00 | 10 | 10.5 | | 10.5 |
| Respondent #4 | 2.00 | 5.00 | + | 3.00 | 11 | 10.5 | | 10.5 |
| Respondent #5 | 3.00 | 5.00 | + | 2.00 | 5 | 6 | | 6 |
| Respondent #6 | 3.00 | 5.00 | + | 2.00 | 6 | 6 | | 6 |
| Respondent #7 | 3.00 | 5.00 | + | 2.00 | 7 | 6 | | 6 |
| Respondent #8 | 3.00 | 5.00 | + | 2.00 | 8 | 6 | | 6 |
| Respondent #9 | 3.00 | 5.00 | + | 2.00 | 9 | 6 | | 6 |
| Respondent #10 | 3.50 | 5.00 | + | 1.50 | 2 | 2 | | 2 |
| Respondent #11 | 4.00 | 5.00 | + | 1.00 | 1 | 1 | | 1 |
| Respondent #12 | 5.00 | 5.00 | | 0.00 | 0 | 0 | | 0 |
| TOTAL | | | | 2.05 | | | 0 | 66 |

How much do you feel you were a part of making BCB's current vision questionnaire results

| WSRT DATA: AVG SCORE | PRE | POST | SIGN | DELTA | RAW RANK | AVE RANK | NEG. RANK | POS. RANK |
|----------------------|------|------|------|-------|----------|----------|-----------|-----------|
| Respondent #1 | 1.00 | 1.00 | | 0.00 | 0 | 0 | | 0 |
| Respondent #2 | 2.00 | 1.00 | - | -1.00 | 1 | 1 | 1 | |
| Respondent #3 | 2.00 | 3.00 | + | 1.00 | 1 | 1 | | 1 |
| Respondent #4 | 2.00 | 4.00 | + | 2.00 | 2 | 4 | | 4 |
| Respondent #5 | 2.00 | 4.00 | + | 2.00 | 3 | 4 | | 4 |
| Respondent #6 | 2.00 | 5.00 | + | 3.00 | 7 | 7.5 | | 7.5 |
| Respondent #7 | 2.00 | 5.00 | + | 3.00 | 8 | 7.5 | | 7.5 |
| Respondent #8 | 3.00 | 5.00 | + | 2.00 | 4 | 4 | | 4 |
| Respondent #9 | 3.00 | 5.00 | + | 2.00 | 5 | 4 | | 4 |
| Respondent #10 | 3.00 | 5.00 | + | 2.00 | 6 | 4 | | 4 |
| Respondent #11 | 5.00 | 5.00 | | 0.00 | 0 | 0 | | 0 |
| Respondent #12 | 5.00 | 5.00 | | 0.00 | 0 | 0 | | 0 |
| TOTAL | | | | 1.45 | | | 1 | 36 |

APPENDIX Y

Goal 2: Communication Skills Questionnaire Data

| WSRT DATA: SUMMED SCORE | PRE | POST | SIGN | DELTA | RAW RANK | AVE RANK | NEG. RANK | POS. RANK |
|-------------------------|-------|-------|------|----------|----------|----------|-----------|-----------|
| Respondent #1 | 7.00 | 18.00 | + | 11.00 | 17 | 16.5 | | 16.5 |
| Respondent #2 | 9.00 | 20.00 | + | 11.00 | 16 | 16.5 | | 16.5 |
| Respondent #3 | 11.00 | 20.00 | + | 9.00 | 15 | 15 | | 15 |
| Respondent #4 | 15.00 | 22.00 | + | 7.00 | 14 | 12 | | 12 |
| Respondent #5 | 16.00 | 23.00 | + | 7.00 | 13 | 12 | | 12 |
| Respondent #6 | 18.00 | 24.00 | + | 6.00 | 9 | 9 | | 9 |
| Respondent #7 | 19.00 | 26.00 | + | 7.00 | 12 | 12 | | 12 |
| Respondent #8 | 20.00 | 27.00 | + | 7.00 | 11 | 12 | | 12 |
| Respondent #9 | 21.00 | 28.00 | + | 7.00 | 10 | 12 | | 12 |
| Respondent #10 | 23.00 | 28.00 | + | 5.00 | 8 | 7.5 | | 7.5 |
| Respondent #11 | 24.00 | 29.00 | + | 5.00 | 7 | 7.5 | | 7.5 |
| Respondent #12 | 25.00 | 29.00 | + | 4.00 | 6 | 5.5 | | 5.5 |
| Respondent #13 | 25.00 | 29.00 | + | 4.00 | 5 | 5.5 | | 5.5 |
| Respondent #14 | 26.00 | 29.00 | + | 3.00 | 4 | 3.5 | | 3.5 |
| Respondent #15 | 27.00 | 29.00 | + | 2.00 | 2 | 2 | | 2 |
| Respondent #16 | 27.00 | 30.00 | + | 3.00 | 3 | 3.5 | | 3.5 |
| Respondent #17 | 23.00 | 24.00 | + | 1.00 | 1 | 1 | | 1 |
| TOTAL | | | | 5.823529 | | | 0 | 153 |

APPENDIX Z

Goal 3: Decision-Making Skills Questionnaire Data

| WSRT DATA: AVG SCORE | PRE | POST | SIGN | DELTA | RAW RANK | AVE RANK | NEG. RANK | POS. RANK |
|----------------------|-------|-------|------|----------|----------|----------|-----------|-----------|
| Respondent #1 | 5.00 | 17.00 | + | 12.00 | 14 | 14 | | 14 |
| Respondent #2 | 7.00 | 20.00 | + | 13.00 | 15 | 15 | | 15 |
| Respondent #3 | 8.00 | 22.00 | + | 14.00 | 17 | 16.5 | | 16.5 |
| Respondent #4 | 10.00 | 24.00 | + | 14.00 | 16 | 16.5 | | 16.5 |
| Respondent #5 | 13.00 | 24.00 | + | 11.00 | 13 | 13 | | 13 |
| Respondent #6 | 14.00 | 24.00 | + | 10.00 | 12 | 11 | | 11 |
| Respondent #7 | 15.00 | 25.00 | + | 10.00 | 11 | 11 | | 11 |
| Respondent #8 | 16.50 | 25.00 | + | 8.50 | 6 | 6 | | 6 |
| Respondent #9 | 17.00 | 26.00 | + | 9.00 | 9 | 8 | | 8 |
| Respondent #10 | 18.00 | 27.00 | + | 9.00 | 8 | 8 | | 8 |
| Respondent #11 | 18.00 | 28.00 | + | 10.00 | 10 | 11 | | 11 |
| Respondent #12 | 19.00 | 28.00 | + | 9.00 | 7 | 8 | | 8 |
| Respondent #13 | 22.00 | 28.00 | + | 6.00 | 3 | 3 | | 3 |
| Respondent #14 | 22.00 | 30.00 | + | 8.00 | 5 | 5 | | 5 |
| Respondent #15 | 23.00 | 30.00 | + | 7.00 | 4 | 4 | | 4 |
| Respondent #16 | 25.00 | 30.00 | + | 5.00 | 2 | 2 | | 2 |
| Respondent #17 | 26.00 | 30.00 | + | 4.00 | 1 | 1 | | 1 |
| TOTAL | | | | 9.382353 | | | 0 | 153 |

APPENDIX AA

BCB Communication Styles Map

| | |
|---|---|
| <p>RATIONAL</p> <p>Lisa</p> <p>Sean</p> <p>Jenny</p> <p>Yodit</p> <p>Michael</p> | <p>CONTROLLING</p> <p>Scott</p> <p>Angelina</p> <p>Rosalind</p> <p>David</p> <p>Robert</p> <p>May</p> |
| <p>SENSITIVE</p> <p>Larisa</p> <p>Katrina</p> <p>Garrett</p> <p>Jodie</p> | <p>DEMONSTRATIVE</p> <p>Tiffany</p> <p>Annie</p> <p>Michele</p> <p>Aidyn</p> <p>Kimberly</p> <p>Meghan</p> |