

Organization Process Approaches

In Chapter 12, we presented interventions aimed at improving interpersonal and group processes. This chapter describes systemwide process interventions—change programs directed at improving such processes as organizational problem solving, leadership, visioning, and task accomplishment between groups—for a major subsystem or for an entire organization.

The first type of intervention, the organization confrontation meeting, is among the earliest organizationwide process approaches. It helps mobilize the problem-solving resources of a major subsystem or whole organization by encouraging members to identify and confront pressing issues.

The second organization process approach is called intergroup relations. It consists of two interventions: the intergroup conflict resolution meeting and microcosm groups. Both interventions are aimed at diagnosing and addressing important organization-level processes, such

as conflict, the coordination of organizational units, and diversity. The intergroup conflict intervention is specifically oriented toward conflict processes, whereas the microcosm group is a more generic systemwide change strategy.

The third and final systemwide process approach, the large-group intervention, has received considerable attention recently and is one of the fastest-growing areas in OD. Large-group interventions get a "whole system into the room"¹ and create processes that allow a variety of stakeholders to interact simultaneously. A large-group intervention can be used to clarify important organizational values, develop new ways of looking at problems, articulate a new vision for the organization, solve cross-functional problems, restructure operations, or devise an organizational strategy. It is a powerful tool for addressing organizational problems and opportunities and for accelerating the pace of organizational change.

ORGANIZATION CONFRONTATION MEETING

The *confrontation meeting* is an intervention designed to mobilize the resources of the entire organization to identify problems, set priorities and action targets, and begin working on identified problems. Originally developed by Beckhard,² the intervention can be used at any time but is particularly useful when the organization is under stress and when there is a gap between the top and the rest of the organization (such as when a new top manager joins the organization). General Electric's "Work-Out" program is an example of how the confrontation meeting has been adapted to fit today's organizations.³ Although the original model involved only managerial and professional people, it has since been used successfully with technicians, clerical personnel, and assembly workers.

Application Stages

The organization confrontation meeting typically involves the following steps:

1. A group meeting of all those involved is scheduled and held in an appropriate place. Usually the task is to identify problems related to the work environment and the effectiveness of the organization.

Groups are appointed representing all departments of the organization. Thus, each group might have one or more members from sales, purchasing, finance, operations, and quality assurance. For obvious reasons, a subordinate should not be in the same group as his or her boss, and top management should form its own group. Group size can vary from five to fifteen members, depending on such factors as the size of the organization and available meeting places.

The point is stressed that the groups are to be open and honest and to work hard at identifying problems they see in the organization. No one will be criticized for bringing up problems and, in fact, the groups will be judged on their ability to do so.

4. The groups are given an hour or two to identify organization problems. Generally, an OD practitioner goes from group to group, encouraging openness and assisting the groups with their tasks.
5. The groups then reconvene in a central meeting place. Each group reports the problems it has identified and sometimes offers solutions. Because each group hears the reports of all the others, a maximum amount of information is shared.
6. Either then or later, the master list of problems is broken down into categories. This can be done by the participants, by the person leading the session, or by the manager and his or her staff. This process eliminates duplication and overlap and allows the problems to be separated according to functional or other appropriate areas.
7. Following problem categorization, participants are divided into problem-solving groups whose composition may, and usually does, differ from that of the original problem-identification groups. For example, all operations problems may be handled by people in that subunit. Or task forces representing appropriate cross sections of the organization may be formed.
8. Each group ranks the problems, develops a tactical action plan, and determines an appropriate timetable for completing this phase of the process.
9. Each group then periodically reports its list of priorities and tactical plans of action to management or to the larger group.
10. Schedules for periodic (frequently monthly) follow-up meetings are established. At these sessions, the team leaders report either to top management, to the other team leaders, or to the group as a whole regarding their team's progress and plans for future action. The formal establishment of such follow-up meetings ensures both continuing action and the modification of priorities and timetables as needed.

Application 13.1 presents the Work-Out process at General Electric Medical Systems business. It shows how the basic framework of a confrontation meeting can be adapted to address organizational problems such as productivity and employee involvement.⁴

Results of Confrontation Meetings

Because organization confrontation meetings often are combined with other approaches, such as survey feedback, determining specific results is difficult. In many cases, the results appear dramatic in mobilizing the total resources of the organization for problem identification and solution. Beckhard cites a number of specific examples in such different organizations as a food products manufacturer, a military products manufacturer, and a hotel.⁵ Positive results also were found in a confrontation meeting with 40 professionals in a research and development firm.⁶

The organization confrontation meeting is a classic approach for mobilizing organizational problem solving, especially in times of low performance. Although the results of its use appear impressive, little systematic study of this intervention has been done. For example, although a variety of anecdotal descriptions exist, there has been no

A Work-Out Meeting at General Electric Medical Systems Business

As part of the large-scale change effort, former CEO Jack Welch and several managers at General Electric devised a method for involving many organization members in the change process. Work-Out is a process for gathering the relevant people to discuss important issues and develop a clear action plan. The program has four goals: to use employees' knowledge and energy to improve work, to eliminate unnecessary work, to build trust through a process that allows and encourages employees to speak out without being fearful, and to engage in the construction of an organization that is ready to deal with the future.

At GE Medical Systems (GEMS), internal consultants conducted extensive interviews with managers throughout the organization. The interviews revealed considerable dissatisfaction with existing systems, including performance management (too many measurement processes, not enough focus on customers, unfair reward systems, and unrealistic goals), career development, and organizational climate. Managers were quoted as saying that

I'm frustrated. I simply can't do the quality of work that I want to do and know how to do. I feel my hands are tied. I have no time. I need help on how to delegate and operate in this new culture.

The goal of downsizing and delaying is correct. The execution stinks. The concept is to drop a lot of "less important" work. This just didn't happen. We still have to know all the details, still have to follow all the old policies and systems.

In addition to the interviews, Jack Welch spent some time at GEMS headquarters listening to and trying to understand the issues facing the organization.

Based on the information compiled, about 50 GEMS employees and managers gathered for a five-day Work-Out session. The participants included the group executive who oversaw the GEMS business, his staff, employee relations managers, and informal leaders from the key functional areas who were thought to be risk takers and

who would challenge the status quo. Most of the work during the week was spent unraveling, evaluating, and reconsidering the structures and processes that governed work at GEMS. Teams of managers and employees addressed business problems. Functional groups developed visions of where their operations were headed. An important part of the teams' work was to engage in "bureaucracy busting" by identifying CRAP (Critical Review Appraisals) in the organization. Groups were asked to list needless approvals, policies, meetings, and reports that stifled productivity. In an effort to increase the intensity of the work and to encourage free thinking, senior managers were not a part of these discussions.

At the end of the week, the senior management team listened to the concerns, proposals, and action plans from the different teams. During the presentations, senior GEMS managers worked hard to understand the issues, communicate with the organization members, and build trust by sharing information and discussing constraints and opportunities. Most of the proposals focused on ways to reorganize work and improve returns to the organization. According to traditional Work-Out methods, managers must make instant, on-the-spot decisions about each idea in front of the whole group. The three decision choices are (1) approval; (2) rejection with clear reasons; and (3) need more data, with a decision to be made within a month.

The five-day GEMS session ended with individuals and functional teams signing close to a hundred written contracts to implement the new processes and procedures or drop unnecessary work. The contracts were between people, between functional groups, and between levels of management. Other organizational contracts affected all GEMS members. One important outcome of the Work-Out effort at GEMS was a decision to involve suppliers in its internal e-mail network. Through that interaction, GEMS and a key supplier eventually agreed to build new-product prototypes together, and their joint efforts have led to further identification of ways to reduce costs, improve design quality, or decrease cycle times.



Work-Out at GE has been very successful but hard to measure in dollar terms. Since 1988, hundreds of Work-Outs have been held, and the concept has continued to evolve into best-practice investigations, process mapping, and change-

acceleration programs. The Work-Out process, however, clearly is based on the confrontation meeting model, where a large group of people gather to identify issues and plan actions to address problems.

published large-sample evaluation of the work out process. There is a clear need for evaluative research.

INTERGROUP RELATIONS INTERVENTIONS

The ability to diagnose and understand intergroup relations is important for OD practitioners because (1) groups often must work with and through other groups to accomplish their goals; (2) groups within the organization often create problems and place demands on each other; and (3) the quality of the relationships between groups can affect the degree of organizational effectiveness. Two OD interventions—microcosm groups and intergroup conflict resolution—are described here. A microcosm group uses members from several groups to help solve organizationwide problems. Intergroup issues are explored in this context, and then solutions are implemented in the larger organization. Intergroup conflict resolution helps two groups work out dysfunctional relationships. Together, these approaches help improve intergroup processes and lead to organizational effectiveness.

Microcosm Groups

A microcosm group consists of a small number of individuals who reflect the issue being addressed.⁷ For example, a microcosm group composed of members representing a spectrum of ethnic backgrounds, cultures, and races can be created to address diversity issues in the organization. This group, assisted by OD practitioners, can create programs and processes targeted at specific issues. In addition to addressing diversity problems, microcosm groups have been used to carry out organization diagnoses, solve communications problems, integrate two cultures, smooth the transition to a new structure, and address dysfunctional political processes.

Microcosm groups work through "parallel processes," which are the unconscious changes that take place in individuals when two or more groups interact.⁸ After groups interact, members often find that their characteristic patterns of roles and interactions change to reflect the roles and dynamics of the group with whom they were relating. Put simply, groups seem to "infect" and become "infected" by the other groups. The following example given by Alderfer⁹ helps to clarify how parallel processes work:

An organizational diagnosis team had assigned its members to each of five departments in a small manufacturing company. Members of the team had interviewed each department head and several department members, and had observed department meetings. The team was preparing to observe their first meeting of department heads and were

trying to anticipate the group's behavior. At first they seemed to have no "rational" basis for predicting the top group's behavior because they "had no data" from direct observation. They decided to role-play the group meeting they had never seen. Diagnostic team members behaved as they thought the department heads would, and the result was uncanny. Team members found that they easily became engaged with one another in the simulated department-head meeting; emotional involvement occurred quickly for all participants. When the team actually was able to observe a department-head meeting, they were amazed at how closely the simulated meeting had approximated the actual session.

Thus, if a small and representative group can intimately understand and solve a complex organizational problem for themselves, they are in a good position to recommend action to address the problem in the larger system.

Application Stages

The process of using a microcosm group to address organizationwide issues involves the following five steps:

1. **Identify an issue.** This step involves finding a systemwide problem to be addressed. This may result from an organizational diagnosis or may be an idea generated by an organization member or task force. For example, one microcosm group charged with improving organizational communications was started by a division manager. He was concerned that the information provided by those reporting directly to him differed from the data he received from informal conversations with people throughout the division.
2. **Convene the group.** Once an issue is identified, the microcosm group can be formed. The most important convening principle is that group membership needs to reflect the appropriate mix of stakeholders related to the issue. If the issue is organizational diversity, then the group should reflect the issue in terms of race, gender, age, disability, sexual orientation, culture, or other dimension. If the issue is integrating two corporate cultures following a merger, the microcosm group should contain people from both organizations who understand their respective cultures. Following the initial setup, the group itself becomes responsible for determining its membership. It will decide whether to add new members and how to fill vacant positions.

Convening the group also draws attention to the issue and gives the group status. Members need to be perceived as credible representatives of the problem. This will increase the likelihood that organization members will listen to and follow the suggestions they make.

3. **Provide group training.** Once the microcosm group is established, training is provided in group problem solving and decision making. Team-building interventions also may be appropriate. Group training focuses on establishing a group mission or charter, working relationships among members, group decision-making norms, and definitions of the problem to be addressed.

From a group-process perspective, OD practitioners may need to observe and comment on how the group develops. Because the group is a microcosm of the organization, it will tend, through its behavior and attitudes, to reflect the problem in the larger organization. For example, if the group is addressing diversity issues in the organization, it is likely to manifest the particular dynamics that raised the issues in the first place. That is, the group may exhibit difficulty communicating across cultures or decision making may exclude or downplay certain group's inputs. Recognizing, within the group, the problem or issue it was formed to address is the first step toward solving the problem in the larger system.

4. **Address the issue.** This step involves solving the problem and implementing solutions. OD practitioners may help the group diagnose, design, implement, and evaluate changes. A key issue is gaining commitment in the wider organization to implementing the group's solutions. Several factors can facilitate such ownership. First, a communication plan should link group activities to the organization. This may include publishing minutes from team meetings; inviting organization members, such as middle managers, union representatives, or hourly workers, into the meetings; and making presentations to different organizational groups. Second, group members need to be visible and accessible to management and labor. This can ensure that the appropriate support and resources are developed for the recommendations. Third, problem-solving processes should include an appropriate level of participation by organization members. Different data collection methods can be used to gain member input and to produce ownership of the problem and solutions.
5. **Dissolve the group.** The microcosm group can be disbanded following successful implementation of changes. This typically involves writing a final report or holding a final meeting.

Results of Microcosm Groups The microcosm group intervention derives from an intergroup relations theory developed by Alderfer, who has applied it to communications and race-relations problems. A microcosm group that addressed communications issues improved the way meetings were conducted; developed a job posting, career development, and promotion program; and conducted new-employee orientations.¹⁰ In addition, the group assisted in the development, administration, and feedback of an organizationwide employee opinion survey. Alderfer also reported seven years of longitudinal data on a race-relations advisory group in a large organization.¹¹ Over time, white members showed significant improvements in their race-relations perceptions; African Americans consistently perceived more evidence of racism in the organization; and attendance at the meetings varied both over time and by race. In addition to the intragroup data, the case documented several changes in the organization, including the development of a race-relations competency document, the implementation of a race-relations workshop, and the creation of an upward-mobility policy.

A dearth of research exists on microcosm groups, partly because it is difficult to measure parallel processes and associate them with measures of organizational processes. More research on this intervention is needed.

Resolving Intergroup Conflict

The intergroup conflict intervention is designed specifically to help two groups or departments within an organization resolve dysfunctional conflicts. Intergroup conflict is neither good nor bad in itself, and in some cases, conflict among departments is necessary and productive for organizations.¹² This applies where there is little interdependence among departments and conflict or competition among them can spur higher levels of productivity. For example, organizations structured around different product lines might want to promote competition among the product groups. This might increase each group's productivity and add to the overall effectiveness of the firm.

In other organizations, especially those with very interdependent departments, conflict may become dysfunctional.¹³ Two or more groups may grow polarized, and their continued conflict may result in the development of defensiveness and negative stereotypes of the other group. Polarization can be revealed in such statements as: "Any solution they come up with is wrong," "We find that nobody in that group will cooperate with us," or "What do you expect of those idiots?" Particularly when intergroup communication is necessary, the amount and quality of communication usually

drops off. Groups begin seeing the others as "the enemy" rather than in positive or even neutral terms. As the amount of communication decreases, the amount of mutual problem solving falls off as well. The tendency increases for one group to sabotage the efforts of the other group, either consciously or unconsciously.

Application Stages A basic strategy for improving interdepartmental or intergroup relationships is to change the perceptions (perhaps, more accurately, misperceptions) that the two groups have of each other. One formal approach for accomplishing this, originally described by Blake and his associates, consists of a 10-step procedure.¹⁴

1. A consultant external to the two groups obtains their agreement to work directly on improving intergroup relationships. (The use of an outside consultant is highly recommended because without the moderating influence of such a neutral third party, it is almost impossible for the two groups to interact without becoming deadlocked and polarized in defensive positions.)
2. A time is set for the two groups to meet—preferably away from their normal work situations.
3. The consultant, together with the managers of the two groups, describes the purpose and objectives of the meeting: to develop better mutual relationships, explore the perceptions the groups have of each other, and formulate plans for improving the relationship. The two groups are presented the following or similar questions: "What qualities or attributes best describe our group?" "What qualities or attributes best describe the other group?" and "How do we think the other group will describe us?" Then, the two groups are encouraged to establish norms of openness for feedback and discussion.
4. The two groups are assigned to separate rooms and asked to write their answers to the three questions. Usually, an outside consultant works with each group to help the members become more open and to encourage them to develop lists that accurately reflect their perceptions, both of their own image and of the other group.
5. After completing their lists, the two groups reconvene. A representative from each group presents the written statements. Only the two representatives are allowed to speak. The primary objective at this stage is to make certain that the images, perceptions, and attitudes are presented as accurately as possible and to avoid the arguments that might arise if the two groups openly confront each other. Questions, however, are allowed to ensure that both groups clearly understand the written lists. Justifications, accusations, or other statements are not permitted.
6. When it is clear that the two groups thoroughly understand the content of the lists, they separate again. By this point, a great number of misperceptions and discrepancies have been brought to light.
7. The task of the two groups (almost always with a consultant as a process observer) is to analyze and review the reasons for the discrepancies. The emphasis is on solving the problems and reducing the misperceptions. The actual or implicit question is not whether the perception of the other group is right or wrong but rather "How did these perceptions occur? What actions on the part of our group may have contributed to this set of perceptions?"
8. When the two groups have worked through the discrepancies, as well as the areas of common agreement, they meet to share both the identified discrepancies and their problem-solving approaches to those discrepancies. Because the primary focus is on the behavior underlying the perceptions, free, open discussion is encouraged between the two groups, and their joint aim is to develop an overall list of remaining and possible sources of friction and isolation.

9. The two groups are asked to develop specific plans of action for solving specific problems and for improving their relationships.
10. When the two groups have gone as far as possible in formulating action plans, at least one follow-up meeting is scheduled so that the groups can report on actions that have been implemented, identify any further problems that have emerged, and, where necessary, formulate additional action plans.

In addition to this formal approach to improving interdepartmental or intergroup relationships there are a number of more informal procedures. Beckhard asks each of the two groups to develop a list of what irritates or exasperates them about the other group and to predict what they think the other group will say about them.¹⁵ A more simplified approach, although perhaps not as effective, is to bring the two groups together, dispense with the written lists developed in isolation, and discuss only common problems and irritations. Finally, based on their experience at TRW Systems, Fordyce and Weil developed a modified approach whereby each group builds three lists—one containing “positive feedback” items (those things the group values and likes about the other group), a “bug” list (those things the group dislikes about the other group), and an “empathy” list (predictions about what the other group’s list contains).¹⁶ When the groups come together, they build a master list of major concerns and unresolved problems, which are assigned priorities and developed into an agenda. When they have completed the task, the subgroups report the results of their discussions to the total group, which then develops a series of action steps for improving the relations between the groups and commits itself to following through. For each action step, specific responsibilities are assigned, and an overall schedule is developed for prompt completion of the action steps.

Different approaches to resolving intergroup conflict form a continuum from behavioral solutions to attitudinal change solutions.¹⁷ Behavioral methods are oriented to keeping the relevant parties physically separate and specifying the limited conditions under which interaction will occur. Little attempt is made to understand or change how members of each group see the other. Conversely, attitudinal methods, such as exchanging group members or requiring intense interaction with important rewards or opportunities clearly tied to coordination, are directed at changing how each group perceives the other. Here, it is assumed that perceptual distortions and stereotyping underlie the conflict and need to be changed to resolve it.

Most of the OD solutions to intergroup conflict reviewed in this section favor attitudinal change strategies. However, such interventions typically require considerably more skill and time than do the behavioral solutions. Changing attitudes is difficult in conflict situations, especially if the attitudes are deep-seated and form an integral part of people’s personalities. Attitudinal change interventions should be reserved for those situations in which behavioral solutions might not work.

Behavioral interventions seem most applicable in situations in which task interdependence between the conflicting groups is relatively low and predictable. For example, the task interaction between the production and the maintenance departments might be limited to scheduled periodic maintenance of machines. Here, higher management can physically separate the departments and specify the limited conditions under which they should interact. Where the shared task requires only limited interaction, that interaction can be programmed and standardized.

Attitudinal change interventions seem necessary when task interdependence between the conflicting groups is high and unpredictable, such as might be found between the research and the production departments during a new-product introduction. Here, the two departments need to work together closely, often at unpredictable times and with novel, complex issues. When conflicts arise because of misperceptions, they must be worked through in terms of people’s perceptions and attitudes. The

shared task does not permit physical separation or limited, specific interaction. It is in these highly interdependent and unpredictable task situations that the conflict resolution interventions discussed in this section are most appropriate.

Application 13.2 presents an example of intergroup conflict resolved by an attitudinal change intervention.¹⁸ The method reflects a variation on the traditional process described above and also places the intervention in a planned change context.

Results of Intergroup Conflict Interventions A number of studies have been done on the effects of intergroup conflict resolution. Positive results have been reported by several researchers in a variety of settings, including union-management relations, an Indian tribal council, government organizations, and for-profit firms.¹⁹ The results include attitudinal changes such as improved perceptions, increased trust, and less stereotyping in addition to improved operational results. For example, Huse found that bringing representatives of different groups together to work on common work-related problems had a marked effect, not only on relationships among a number of different manufacturing groups but also on the quality of the product, which increased 62%.²⁰

The technology for improving intergroup relations is promising. A greater distinction between attitudinal and behavioral changes needs to be made in planning effective intergroup interventions. A greater variety of interventions that address the practical difficulties of bringing two groups together is also necessary. Finally, more knowledge is needed about how culture affects intergroup conflict and how interventions need to be adjusted in cross-cultural situations.²¹ Growing knowledge and theory suggest that conflict can be either functional or dysfunctional, depending on the circumstances. Further research is needed to identify when conflict should be intensified and when it should be reduced.

LARGE-GROUP INTERVENTIONS

The third systemwide process intervention is called large-group intervention. Such change programs have been referred to variously as "search conferences," "open-space meetings," "open-systems planning," "world cafés," "future searches," "decision accelerators," and "Appreciative Inquiry Summits."²² They focus on issues that affect the whole organization or large segments of it, such as developing new products or services, responding to environmental change, redesigning the organization, or introducing new technology. The defining feature of large-group intervention is the bringing together of large numbers of organization members and other stakeholders, often more than a hundred, for a two- to four-day meeting or conference. Here, conference attendees work together to identify and resolve organizationwide problems, to design new approaches to structuring and managing the firm, or to propose future directions for the organization. Large-group interventions are among the fastest-growing OD applications in large part because they reflect the core values of OD, including inclusion, participation, and learning.²³

Large-group interventions can vary on several dimensions, including purpose, size, length, structure, and number. The purpose of these change methods can include creating the future and setting direction, redefining work, organization structures, and systems, and planning or solving particular organizational problems.²⁴ Large-group interventions have been run with groups of less than 50 to more than 2,000 participants and have lasted between one and five days. Some large-group processes are relatively planned and structured; others are more informal. Some interventions involve a single large-group meeting; others include a succession of meetings to accomplish systemwide change in a short period of time.

Despite these differences, most large-group interventions have similar conceptual foundations and methods.²⁵ These interventions have evolved over the past 30 years

Improving Intergroup Relationships in Johnson & Johnson's Drug Evaluation Department

application 13.2

Johnson & Johnson (J&J) is one of the world's largest manufacturers of health care products. The fundamental objective of the company is to provide scientifically sound, high-quality products and services to help heal the sick, cure disease, and improve the quality of life. In mid-2000, J&J made a strategic decision to merge two research and development organizations in the Pharmaceuticals Group. Departments in the Robert Wood Johnson Pharmaceutical Research Institute, headquartered in New Jersey, and the Janssen Research Foundation, headquartered in Belgium, were integrated to create a leading-edge global function called the Drug Evaluation (DE) organization. DE's purpose is to rapidly generate data that allows J&J to make the best investment decisions about the drug portfolio. In the overall R&D process, the group is the bridge between discovery of new compounds and full development of a new drug. As a group, they are responsible for investigating all compounds that may be potential new products and making data-driven decisions in collaboration with the discovery and full-development groups. The highest-quality and highest-potential discovery compounds are quickly and efficiently moved through preclinical development and into initial human trials. DE employees experience a genuine and unique opportunity to shape the R&D pipeline in J&J and ultimately influence patient well-being. It is an exciting and challenging place to be in.

Most of the first half of 2001 was spent in merger and integration activity with the groups, while moving compounds through the pipeline. The DE management team has overall responsibility for the organization and consists of the global head of DE and seven direct reports representing chemical pharmaceuticals, clinical drug evaluation, clinical operations, and portfolio planning and resource management (PPRM), among others.

One of the groups, the PPRM group was a new function created to improve the efficiency of DE processes. They allowed the DE management team to accurately track compounds as they moved

through the process and provided information in a consistent manner across the organization. The group consisted of project champions, portfolio planners, resource managers, and support staff. Project champions were the core of the PPRM group. When a compound is accepted into DE, the project champion leads a project team consisting of representatives from the different functions. This team is responsible for planning and executing the DE plan for their compound. The project champion works closely with all of the functions to ensure the compound progresses on schedule through the different stages of the process and ultimately on the handoff to full development.

The Clinical Drug Evaluation group was responsible for developing clinical plans that would take the new drug compound into human trials. The group consisted primarily of clinical scientists, MDs who were responsible for focusing on the key questions to be identified to achieve DE deliverables. Clinical scientists were also responsible for communicating these questions and the results from the clinical aspects of the project to the rest of the project team. The quality of the data depends on asking the right questions, so this role is critical to delivering business benefits of the compound.

In the fall of 2001, the DE management team expressed concern that there were many issues surfacing about the nature of the work, roles and responsibilities, and the general cohesion within DE. This was particularly true with the clinical scientists and the project champions. They worried that a conflict between the schedule-oriented project champions and the quality-oriented clinical specialists was hurting department morale. The DE management team asked an OD practitioner to help with understanding and addressing these issues. As part of the process, the practitioner conducted diagnostic interviews with various members of the PPRM and Clinical Drug Evaluation groups. She found that opinions varied widely as to the nature of the problem and its characteristics. For example, some people did not perceive a problem, some believed it had nothing to do with the interaction

of the project champions and the clinical scientists, and others believed it was a lack of clear roles and responsibilities. Overall, seven different themes emerged from the data, although no single issue dominated. Faced with this lack of agreement on the issue and its causes, the practitioner, in collaboration with the different groups, proposed a three-day off-site meeting to work through the data and concerns.

The meeting was held in January 2002 in Villars, Switzerland (selected for its neutrality), and consisted of exercises to improve communications and a process to address intergroup conflict. Members of the PPRM and Clinical Drug Evaluation groups were asked to address the following questions:

- What do we want from you?
- What we don't want from you?
- What do we offer/give you?
- What we don't offer/give you?

Each group was asked to discuss and come to consensus about their perceptions of the other group. Reflecting the diagnostic data, there was a lively discussion within each group as perceptions were shared, discussed, and resolved.

When each group presented their results, typical responses included the following: "We want your expertise;" "We want everyone to be a part of the team;" "We want input, support and agreement,

adequate time, and frequent interaction." The groups did not want surprise decisions, delayed or filtered information, and responsibility for another's job. These themes were consistent across both groups.

The practitioner then opened the floor for a large-group discussion of the presentations. Although a variety of issues were discussed and clarified, the groups noticed that they were in 90% agreement. The key issue that needed to be resolved was the decision-making process. The practitioner then facilitated a discussion of how the two groups should make decisions and they agreed on a method to do so.

As a result of the meeting, the two groups reported improved relations and increased trust because of an increased understanding of each other's perspectives. They developed positive, cooperative attitudes toward the other group, understood how different cultural backgrounds and working styles were contributing to the strained decision-making process, and were able to reach agreement on a variety of important roles and responsibilities. In addition, a few weeks after the meeting, the participants said they realized the importance of setting the time aside to work through the issues. They gained an appreciation for a need to have consistency in methods and tools for the teams. The DE management team was pleased with the results.

and represent a combination of open-systems thinking, participation and social construction, and self management. Open-systems thinking, as outlined in Chapter 5, directs attention to how organizations interact with and are shaped by their environments. Proponents of large-group interventions suggest that an organization's current state is the result of the intentional and unintentional interaction among many groups and individuals both inside and outside the organization. Changing the organization's vision, structure, strategy, or work therefore requires the deliberate, face-to-face coordination of these groups.

The participation and social construction assumptions support the open-systems view. The participation assumption suggests that a variety of organization stakeholders must be involved to create an accurate view of the environment and organization. The social construction assumption suggests that only by developing a shared understanding of the environment and the organization among these stakeholders can "common ground" be found and coordinated action be possible. Without a broad and shared view, conflicts can arise about what parts of the environment or what actions are most

important. Such perceptual disagreements make planning and implementing a coherent strategy difficult.²⁶

Finally, the self-management assumption proposes that large-group processes must create the conditions for ownership and commitment. All large-group methods attempt to create a rhythm of large-group presentations balanced against small-group discussions, exercises, tasks, and dialogues. Through the small-group work, participants work with a variety of stakeholders, build perspective, and become committed to action.

Application Stages

Conducting a large-group intervention generally involves preparing for the meeting, conducting it, and following up on outcomes. These activities are described below.

Preparing for the Large-Group Meeting A design team comprising OD practitioners and several organization members is formed to organize the event. The team generally addresses three key ingredients for successful large-group meetings: a compelling meeting theme, appropriate participants, and relevant tasks to address the theme.

1. **Compelling meeting theme.** Large-group interventions require a compelling reason or focal point for change. Although "people problems" can be an important focus, more powerful reasons for large-group efforts include managing impending mergers or reorganizations, responding to environmental threats and opportunities, or proposing radical organizational changes.²⁷ Whatever the focal point for change, senior leaders need to make clear to others the purpose of the large-group meeting. Ambiguity about the reason for the intervention can dissipate participants' energy and commitment to change. For example, a large-group meeting that successfully envisioned a hospital's future organization design was viewed as a failure by a few key managers who thought that the purpose was to cut costs from the hospital's budget. Their subsequent lack of support stalled the change effort.
2. **Appropriate participants.** A fundamental goal of large-group interventions is to "get the whole system in the room." This involves inviting as many people as possible who have a stake in the conference theme and who are energized and committed to conceiving and initiating change. Senior managers, suppliers, union leaders, internal and external customers, trade-group representatives, government and regulatory officials, and organization members from a variety of jobs, genders, races, and ages are potential participants.
3. **Relevant tasks to address the conference theme.** As described below, these tasks typically are assigned to several subgroups responsible for examining the theme and drawing conclusions for action. Generally, participants rely on their own experience and expertise to address systemwide issues, rather than drawing on resources from outside of the large-group meeting. This ensures that the meeting can be completed within the allotted time and that members can participate fully as important sources of information.

Conducting the Meeting The flow of events in a large-group meeting can vary greatly, depending on its purpose and the framework adopted. Most large-group processes, however, fit within three primary frameworks: open-systems methods, open-space methods, and positive methods. These various methods reflect different strategies for dealing with the four key dilemmas of large-group interventions:

1. The dilemma of voice refers to the problem of encouraging participation on the one hand and being overwhelmed if each individual wants to speak. Even when a large-group event is relatively small in terms of participants, time would quickly run out if everyone wanted to speak up in the large group.

2. The dilemma of structure refers to how tightly or loosely the meeting should be organized. Some methods, like the open-systems processes described below, can be tightly controlled while others, like the open-space methods, are almost unstructured. The dilemma is not knowing how much structure a particular group prefers, how much they want, or how much anxiety they are experiencing.
3. The egocentric dilemma refers to the problem of people holding on to their own personal views of right or wrong, better or worse. When individuals hold on too tightly, it makes large-group decision making difficult. When a large-group event overly represents one stakeholder group, that group can dominate the conversation and be less open to alternative points of view.
4. The dilemma of emotional contagion refers to a group dynamic where many people take on the frustrations or excitement of others. When emotional contagion happens, people unconsciously give up their ownership of a problem, action, or solution and get swept up in the moment. It represents a large-group version of "groupthink" and can result in solutions that people, upon reflection, cannot support.

Open-Systems Methods. A variety of large-group approaches, such as search conferences, open-systems planning, decision accelerators, and real-time strategic change, have their basis in open-systems methods and are among the more structured large-group processes. These approaches help organizations assess their environments systematically and develop strategic responses to them. They help organization members develop a strategic mission for relating to the environment and influencing it in favorable directions. Open-systems methods begin with a diagnosis of the existing environment and how the organization relates to it. They proceed to develop possible future environments and action plans to bring them about.²⁸ These steps are described below.

1. **Map the current environment surrounding the organization.** In this step, the different domains or parts of the environment are identified and prioritized. This involves listing all external groups directly interacting with the organization, such as customers, suppliers, or government agencies, and ranking them in importance. Participants then are asked to describe each domain's expectations for the organization's behavior.
2. **Assess the organization's responses to environmental expectations.** This step asks participants to describe how the organization currently addresses the environmental expectations identified in step 1.
3. **Identify the core mission of the organization.** This step helps to identify the underlying purpose or core mission of the organization, as derived from how it responds to external demands. Attention is directed at discovering the mission as it is revealed in the organization's behavior, not as it is pronounced in the organization's official statement of purpose. This is accomplished by examining the organization and environment transactions identified in steps 1 and 2 and then assessing the values that seem to underlie those interactions. These values provide clues about the actual identity or mission of the organization.
4. **Create a realistic future scenario of environmental expectations and organization responses.** This step asks members to project the organization and its environment into the near future, assuming no real changes in the organization. It asks participants to address the question, "What will happen if the organization continues to operate as it does at present?" Participant responses are combined to develop a likely organization future under the assumption of no change.
5. **Create an ideal future scenario of environmental expectations and organization responses.** Members are asked to create alternative, desirable futures. This

involves going back to steps 1, 2, and 3 and asking what members ideally would like to see happen in the near future in both the environment and the organization. People are encouraged to fantasize about desired futures without worrying about possible constraints.

5. **Compare the present with the ideal future and prepare an action plan for reducing the discrepancy.** This last step identifies specific actions that will move both the environment and the organization toward the desired future. Planning for appropriate interventions typically occurs in three timeframes: tomorrow, six months from now, and two years from now. Participants also decide on a follow-up schedule for sharing the flow of actions and updating the planning process.

There are a number of variations on this basic model, each of which follows a similar pattern of creating common ground, discussing the issues, and devising an agenda for change. For example, search conferences begin with an exercise called "appreciating the past," which asks participants to examine the significant events, milestones, and highlights of the organization's previous 30 years (or less, in the case of newer organizations).²⁹ It demonstrates that participants share a common history, although they may come from different organizations, departments, age groups, or hierarchical levels.

Once common ground is established, members can discuss the systemwide issue or theme. To promote widespread participation, members typically organize into subgroups of 8–10 people representing as many stakeholder viewpoints as possible. The subgroups may address a general question (for example, "What are the opportunities for new business in our global market?") or focus on a specific issue (for example, "How can we improve quality and cut costs on a particular product line?"). Subgroup members brainstorm answers to these questions, record them on flipchart paper, and share them with the larger group. The whole group compares responses from the subgroups and identifies common themes. Other methods, such as presentations to the large group, small-group meetings on particular aspects of the conference theme, or spontaneous meetings of interest to the participants, are used to discuss the conference theme and distribute information to members.

The final task of large-group meetings based on open-systems methods is creating an agenda for change. Participants are asked to reflect on what they have learned at the meeting and to suggest changes for themselves, their department, and the whole organization. Members from the same department often are grouped together to discuss their proposals and decide on action plans, timetables, and accountabilities. Action items for the total organization are referred to a steering committee that addresses organizationwide policy issues and action plans. At the conclusion of the large-group meeting, the departmental subgroups and the steering committee report their conclusions to all participants and seek initial commitment to change.

Application 13.3 describes the large-group decision accelerator process at Alegent Health. The decision accelerator model was used to generate an innovative vision and strategy for the key clinical areas within the health care system. It followed an open-systems model to design and implement its large-group meeting.

Open-Space Methods. The second approach to large-group interventions attempts to address the four dilemmas by imposing a minimal level of formal structure. Open-space methods temporarily restructure or "self-organize" participants around interests and topics associated with the conference theme. They generally follow these steps:³⁰

1. **Set the conditions for self-organizing.** In the first step, the OD practitioner or manager responsible for the large-group intervention sets the stage by announcing the theme of the session and the norms that will govern it. In addition, participants are informed that the meeting will consist of small-group discussions convened by

application 13.3

Using the Decision Accelerator to Generate Innovative Strategies in Alegent's Women's and Children's Service Line

The applications in Chapters 4, 7, and 11 described the process of entry, contracting, data collection, and evaluation in a large-group intervention at Alegent Health. In this application, we describe the Women's and Children's Right Track Decision Accelerator workshop. It was one of the initial six DAs intended to set a vision and strategy for the clinical service areas within the health system.

The Alegent Health (AH) organization is a large health care system in Eastern Nebraska and Western Iowa. It has five large hospitals and a variety of outpatient clinics. As part of the change agenda from the new CEO, Wayne Sensor, a Chief Innovation Officer, Ted Schwab, was hired to lead in the development of a transformed health care system. Under a corporate vision that included achieving "world-class leadership in compassionate, faith-based health services that measurably enriches the lives of families we serve through an exceptional commitment to quality," Schwab engaged two OD consultants from California, Joel Fadem and Stu Winby. Fadem was a professor at UCLA who specialized in health care organizations, and Winby was a former internal OD consultant at Hewlett Packard, where he had innovated on large-group interventions during the HP-Compaq merger (see Application 10.4). Together, Schwab, Fadem, and Winby worked with other members of AH to decide on the use of large-group interventions as a way to generate innovative thinking, strategies, and decision making in the organization.

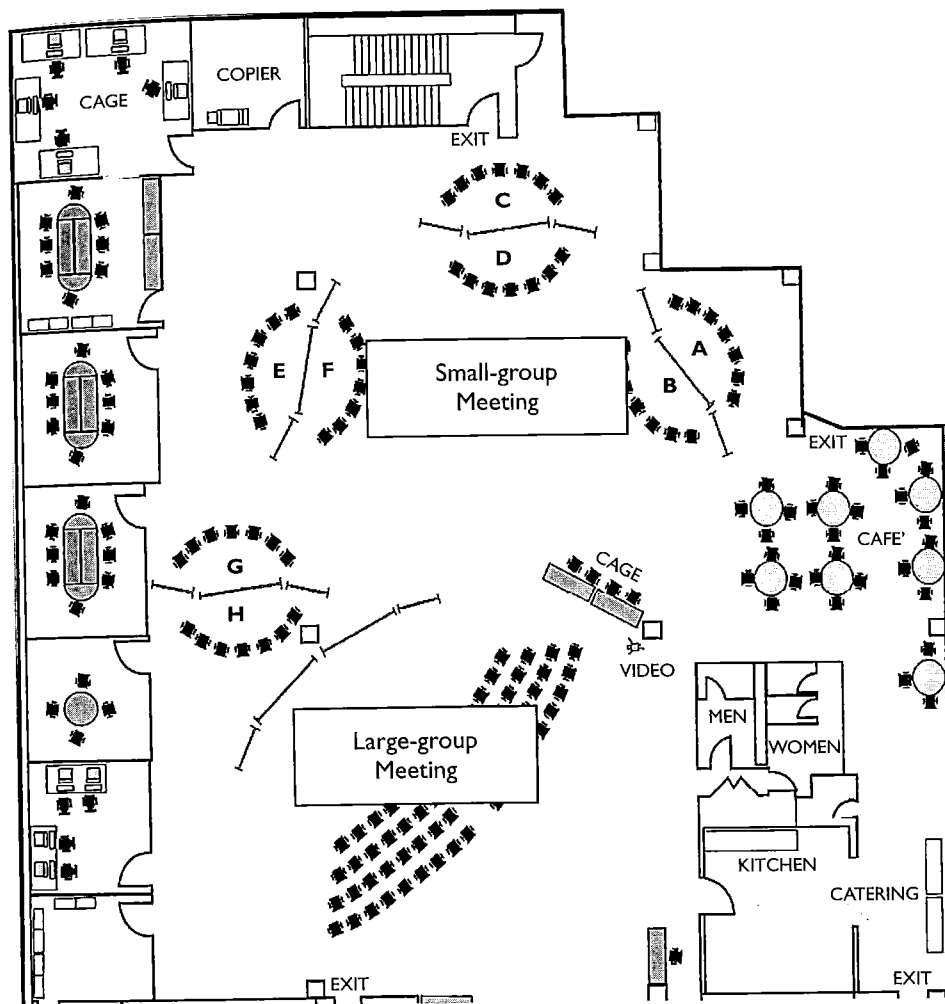
The strategic innovation process was kicked off in June 2005, with six large-group "decision accelerators," one for each of the clinical service lines. A decision accelerator is similar to other large-group interventions, especially those based on open-systems thinking. It has two unique attributes that distinguish it from the others. First, a DA is more than a process; it is a physical space. Alegent Health not only committed to the large-group intervention as a method for innovation, it committed physical resources to maximizing the impact of the work. The organization leased half a floor of an office building in Omaha, gutted the offices, and built a

completely flexible facility to support the DA process (see figure below). Each DA space is designed to fit the situation and organization needs, but has several things in common. The primary working space is completely flexible with moveable white boards where small groups record their outputs and discussions, moveable chairs, and so on. Alegent's DA space had a unique feature that proved to be a favorite among the participants. All of the walls in the space could be written on with erasable markers. That is, the walls of the room—and there was a lot of wall space—could host planned or impromptu meetings where the group members could draw what they were thinking.

Second, the DA, like other large-group interventions, assumes that by getting the "whole system in the room," a richer, more complete conversation and better decisions ensue. However, the DA does not assume that "all" of the necessary or available information is in the room and so most DA spaces include some kind of library with Internet-enabled computer terminals and other source documentation (e.g., white papers, articles, books) that might inform the discussion during the DA.

The Women's and Children's (W&C) DA was the fourth one conducted at AH. The agenda for the W&C DA was similar to others, but Fadem and Winby worked with the VP in charge of the clinical area, Joan Neuhaus, to modify some of the activities to fit with the challenges, opportunities, and existing features of the W&C service line. For example, Joan wanted the group to address the handling of high-risk pregnancies and deliveries as well as thinking about women's health issues more broadly. Also as part of the preparation, Steve Houston, who directed the facility, put together his team of support staff, including note takers who transcribed large-group discussions and report-outs, photographers who captured all small-group outputs, a graphic facilitator who recorded the large-group conversations in a visual format, and catering for the meeting. The support staff played a critical role in the success of a DA by knowing the agenda well enough to position





the physical facility in advance of any activity so that the participants needed only to focus on the content of the meeting. This included having handouts, instructions, surveys, and other documents prepared in advance, which made it possible to handle any immediate requests from the facilitators.

On Day one, the participants arrived to a light breakfast and were immediately given a task. Using the white boards that were in front of the large-group meeting space, called the theater, each participant in the workshop was to find a marker and to write down the events, forces, trends, and innovations that they knew of or heard about in seven

different categories (e.g., technology, medicine/health care, society, the economy, globally, ecologically, and in education). The white boards had been prepared in advance by Houston's team with the seven categories and with each white board representing a particular time period: 1975–1990, 1991–2005, and 2006–2020. After about fifteen minutes, the participants were asked to find two people they didn't know and the trio had to share the things they had written down.

Following the environmental scanning activity, an introduction and overview of the agenda took place. The CEO welcomed the participants and encouraged them to talk about the things that would

make Alegant Health a "world-class" organization. He referred the group to the corporate vision, expressed his commitment to the effort, and said he would be back on the last day to hear their ideas for creating a world-class W&C service line.

The next few activities asked participants, in small groups first and then in large-group report-outs, to think about the implications of the environmental events on the W&C service line by 2015, what was implied by the "world class" part of the Alegant Health vision, and the implications "world class" had for the W&C clinical area. For each activity, a relevant organizing structure was used. For example, for discussing the implications of "world class" on the W&C clinical area, the groups were broken down into stakeholder categories. How might, for example, patients, the community, or physicians view a world-class W&C service? In each activity, the small groups were composed of multiple stakeholders, including physicians, managers/executives from Alegant, patients and families, community members, and other stakeholders.

Before the day ended, Winby asked the group a question: "If there was one thing that you really want to make sure gets addressed at this meeting to make it a success for you, what would that be?" He had people write their questions on a piece of paper and put it into a box as they were leaving.

During the debrief after the first day, the facilitators and support team reviewed what went well and any processes that needed to be improved, discussed the energy and interests of the participants, and sorted the "what's most important" questions into similar themes in preparation for an activity on Day two.

Day two began with a welcome from Neuhaus and then the group went to work. The first activity was to take the work from the Day one W&C visioning activities and prioritize the different elements. The group was questioned as to what, for them, were the most important dimensions of a world-class W&C service line? In addition, the group was led through an exercise to determine if there were any

technologies or regulatory events that would fundamentally alter the way health care was delivered in this area. The group discussed, for example, the implications of being able to deliver a child that was less than 20 weeks old.

In the next exercise, the facilitators asked the group to address the questions they had asked at the end of Day one. The questions had been categorized into six areas, including gaps in the community's health care, women's health service offerings, and obstetrics among others. The participants were allowed to sign up to discuss whatever subject interested them. In the report-out of the groups, an important issue that had been simmering throughout Day one was surfaced. That is, should high-risk pregnancies and deliveries be centralized to one hospital and what would that imply? The large group debated this subject from a variety of perspectives. In the end, it was agreed that such a move made sense from the world-class perspective, but that it would be difficult to implement and would face much resistance.

The final activity asked the participants to synthesize their discussions and activities into a high-level "horizons map." That is, for each of the major categories that had been discussed, including women's health, obstetrics, child/adolescent medicine, and community health, the group was to lay out the key decisions, milestones, and events that would need to take place over the next 18 months, by 2010, and by 2015 to realize their vision of a world-class W&C clinical area.

On Day three, the senior leadership team from Alegant Health joined the group and listened to a presentation of the horizon map. The graphic facilitator drew the final horizons map with pictures, words, and symbols, and this was used as the outline for the presenters. Following the presentations, the executives asked questions and discussed some of the group's decisions. In addition, they laid out the "next steps" of the process, including gathering the data from all of the clinical area DAs in order to resource the strategies appropriately.

the participants and addressing any topic they believe critical to the theme of the conference. Two sets of norms govern how open-space methods are applied, and although the norms may sound ambiguous, they are critical to establishing the conditions for a successful meeting.

The first set of norms concerns the "Law of Two Feet." It encourages people to take responsibility for their own behavior—to go to meetings and discussions where they are learning, contributing, or in some way remaining interested. Moving from group to group is legitimized by the roles of "butterflies" and "bumblebees." Butterflies attract others into spontaneous conversations and, in fact, may never attend a formal meeting. Bumblebees go from group to group and sprinkle knowledge, information, or new ideas into different meetings.

The second set of norms is labeled the "Four Principles." The first principle is "whoever comes is the right people." It is intended to free people to begin conversations with anyone at any time. It also signals that the quality of a conversation is what's most important, not who's involved. The second principle, "Whatever happens is the only thing that could have," infuses the group with responsibility, encourages participants to be flexible, and prepares them to be surprised. "Whenever it starts is the right time" is the third principle and is aimed at encouraging creativity and following the natural energy in the group. The final principle, "When it is over, it is over," allows people to move on and not feel like they have to meet for a certain time period or satisfy someone else's requirements.

2. **Create the agenda.** The second step in open-space interventions is to develop a road map for the remainder of the conference. This is accomplished by asking participants to describe a topic related to the conference theme that they have passion for and interest in discussing. This topic is written on a large piece of paper, announced to the group, and then posted on the community bulletin board where meeting topics and locations are displayed.³¹ The person announcing the topic agrees to convene the meeting at the posted time and place. This process continues until everyone who wants to define a topic has been given the chance to speak. The final activity in this step asks participants to sign up for as many of the sessions as they have interest in. The open-space meeting begins with the first scheduled sessions.
3. **Coordinate activity through information.** During an open-space session, there are two ways to coordinate activities. First, each morning and evening a community meeting is held to announce new topics that have emerged for which meeting dates and times have been assigned, or to share observations and learnings. Second, as the different meetings occur, the conveners produce one-page summaries of what happened, who attended, what subjects were discussed, and what recommendations or actions were proposed. Typically, this is done on computer in a room dedicated for this purpose. These summaries are posted near the community bulletin board in an area often labeled "newsroom." Participants are encouraged to visit the newsroom and become familiar with what other groups have been discussing. The summaries also can be printed and copied for conference participants.

Positive Methods. The final large-group intervention represents a hybrid approach to the four dilemmas. It is distinguished from the other two methods by its use of the positive approach to change described in Chapter 2. In fact, many of the futuring and visioning exercises in the open-systems approaches that help guide members in creating "images of potential" toward which the organization can grow and develop are drawn from this approach.³² These methods can increase members' energy for change and build a broad consensus toward a new future. Like other large-group methods, these approaches can help look at a variety of organizational issues; however, their distinguishing feature is the "appreciative" framing of issues and the leveraging of the organization's positive core attributes. The Appreciative Inquiry (AI) Summit approach suggests that human

organizing and change should be a relational process of inquiry, grounded in affirmation and appreciation.³³ The four-steps in an AI summit are as follows:

1. **Discover the organization's positive core.** With respect to the purpose of the summit, participants first pair up with another person and conduct an appreciative interview. If the summit is organized to take advantage of a new market opportunity, the questions would generate stories about experiences where a group or organization was most successful in being entrepreneurial and swift. If the summit were about addressing poor organization coordination, the questions and stories would be personal experiences where two or more groups worked well together. Following the interviews, the pairs join up with three other pairs to discuss their answers to the questions. What is it that is common among all these stories? What are the elements of successful entrepreneurship or collaboration, for example? These small-group conversations are then aggregated to create a broad and inclusive list of success factors and other themes associated with these successful experiences.
2. **Dream about and envision a more desired and fulfilling future.** In this step, participants use the themes and success factors from the first activity to develop compelling images of the future. In this visioning exercise, participants are encouraged to make bold and provocative propositions about what could be in the future. To arrive at a bold vision, small groups share their greatest hopes or act out skits and presentations that convey what they believe is possible. Unlike open system or open space methods, there is very little prioritizing or culling out of the best or more compelling themes. The positive approach believes that breadth and inclusiveness are the most important way to galvanize organization change.
3. **Design the structural and systems arrangements that will best reflect and support the vision or dream.** Members of the summit identify the design features (strategies, structures, systems, processes) that will need to be in place to make the vision a reality. This step allows participants to articulate the dream in concrete terms.
4. **Create the specific action plans that will fulfill the organization's destiny.** The primary task of destiny step is to identify the projects, initiatives, and action plans required to implement the design criteria. Task forces are formed, teams volunteer to take on projects, and any governance mechanisms needed to coordinate the effort are created.

Following up on Meeting Outcomes Follow-up efforts are vital to implementing the action plans from large-scale interventions. These efforts involve communicating the results of the meeting to the rest of the organization, gaining wider commitment to the changes, and structuring the change process. In those cases where all the members of the organization were involved in the large-group meeting, implementation can proceed immediately according to the timetable included in the action plans.

Results of Large-Group Interventions

In the past decade, the number of case studies describing the methods and results of large-group interventions has increased dramatically. Such interventions have been conducted at for-profit firms like Hewlett-Packard, Boeing, Kodak, Microsoft, Motorola, Marriott, and Rockport, and at such governmental and nongovernmental organizations as Save the Children, World Vision, the City of Carlsbad, California, and the US Department of Agriculture. Large-group interventions are increasingly common in other countries, including Pakistan, South Africa, China, Australia, England, Mexico, and India.³⁴ Despite the proliferation of practice, however, Purser and Griffin lament that "empirical research, such as longitudinal studies, quasi-experimental field studies, and studies of large sample sizes across a wide variety of LGIs are severely lacking-

data that is available tends to be anecdotal or single case studies from practitioners and consultants who have a commercial stake in promoting their own methods.³⁵ Yaeger, Bremsen, and Bengtsson's review of AI supports this criticism. Of the 34 reported empirical evaluations of the AI Summit approach, all of them were case studies.³⁶ Because these change efforts often set the stage for subsequent OD interventions, it is difficult to isolate their specific results from those of the other changes. Anecdotal evidence from practitioners and case studies suggest that benefits can include increased energy toward organizational change, improved feelings of community, ability to see "outside the box," increased speed of change, and improved relationships with stakeholders.³⁷ In addition, several case studies have documented improved business outcomes, such as decreased turnover, absenteeism, and costs.³⁸ Clearly, systematic research is needed on this important systemwide process intervention.

SUMMARY

This chapter described three types of systemwide process interventions: confrontation meetings, intergroup interventions, and large-group interventions. The organization confrontation meeting is a way of mobilizing resources for organizational problem solving and seems especially relevant for organizations undergoing stress. The intergroup relations approaches are designed to help solve a variety of organizational problems. Microcosm groups can be formed to address particular issues and use parallel processes to diffuse group solutions to the organization. The intergroup conflict resolution approach involves a method for mitigating dysfunctional conflicts between groups or departments. Conflict can be dysfunctional in situations in which groups must work together. It may, however, promote organizational effectiveness when departments are relatively independent of each other. Large-group interventions are designed to focus the energy and attention of a "whole system" around organizational processes such as a vision, strategy, organization design, or culture. It is best used when the organization is about to begin a large-scale change effort or is facing a new situation. These three process interventions represent important, time-honored, and successful methods of introducing change in organizations.

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Lincoln Hospital: Third-Party Intervention

Soon after the election of a new chief of surgery, the president of Lincoln Hospital faced a crisis. Lincoln, a 400-bed for-profit hospital in the southwestern United States, was experiencing severe problems in its operating room (OR). Forty percent of the OR nurses had quit during the previous eight months. Their replacements were significantly less experienced, especially in the specialty areas. Furthermore, not all could be replaced; when the crisis came to a head, the OR was short seven surgical nurses.

Also, needed equipment often was not available. On several occasions, orthopedic surgeons had already begun surgery before they realized the necessary prosthesis (for example, an artificial hip, finger joint, or knee joint) was not ready, or was the wrong size, or had not even been ordered. Surgery then had to be delayed while equipment was borrowed from a neighboring hospital. Other serious problems also plagued the OR. For example, scheduling problems made life extremely difficult for everyone involved. Anesthesiologists often were unavailable when they were needed, and habitually tardy surgeons delayed everyone scheduled after them. The nursing shortage exacerbated these difficulties by requiring impossibly tight scheduling; even when the doctors were ready to begin, the scheduled nurses might still be occupied in one of the other operating rooms.

The surgeons were at odds among themselves. Over 30 of them were widely regarded as prima donnas who considered their own time more valuable than anyone else's and would even create emergencies in order to get "prime time" OR slots—for which, as often as not, they were late. Worst of all, however, the doctors and nurses were virtually at war. Specifically, Don, the new chief of surgery, was at war with Mary, the veteran OR

director; indeed, he had campaigned on a promise to get her fired.

Lincoln's president was faced with a difficult choice. On the one hand, he needed to satisfy the physicians, who during the tenure of his predecessor had become accustomed to getting their way in personnel matters by threatening to take their patients elsewhere. The market was, as the physicians knew, increasingly competitive, and the hospital was also faced with escalating costs, changes in government regulations, and strict Joint Commission on Accreditation of Hospitals standards. Could the president afford to alienate the surgeons by opposing their newly chosen representative—who had a large practice of his own?

On the other hand, could he afford to sacrifice Mary? She had been OR director for 13 years, and he was generally satisfied with her. As he later explained,

Mary is a tough lady, and she can be hard to get along with at times. She also doesn't smile all that much. But she does a lot of things right. She consistently stays within her budget

Furthermore, whereas Don had long been an outspoken critic of the hospital and was generally distrusted by its administrators, Mary was loyal, a strict constructionist who adhered firmly to hospital policies and procedures:

She is supportive of me, of the hospital, and of our interests. She doesn't let the doctors get away with much. She has been an almost faultless employee for years, in the sense that she comes to work, gets the job done, never complains, and doesn't make any waves. I really don't understand the reason for the recent problems. I trust her and want to keep her. It would be extremely difficult to replace her.

The last point was a key one; a sister hospital had spent almost three years unsuccessfully trying to recruit an OR director.

After talking with both nurses and doctors, the president decided not to fire Mary. Instead, he told both Mary and Don that they must resolve their differences. They were to begin meeting right away and keep on meeting, however long it took, until they got the OR straightened out.

The results were predictable. Neither party wanted to meet with the other. Mary thought the whole exercise was pointless, and Don saw it as a power struggle that he could not afford to lose. The president, who wanted an observer present, chose Terry, the new executive vice president and chief operating officer. Mary didn't know Terry very well so she asked that her boss, the vice president of patient services, sit in. Don, who "didn't trust either Mary or her boss as far as he could throw them," countered with a request for a second of his own, the vice president for medical services. When the meeting finally occurred, it quickly degenerated into a free-for-all, as Don and Mary exchanged accusations, hotly defended themselves, and interpreted any interventions by the three "observers" as "taking sides."

DIAGNOSIS

At this point, Lincoln's president called me. We negotiated a psychological contract, where the president shared the above historical information, described the problem as he saw it, and identified his expectations of me and for the project. I, in turn, articulated my expectations of the president. We then agreed to take no steps until I had interviewed both Don and Mary.

Later that afternoon, Don expressed his anger and frustration with the hospital administration and, most of all, with Mary:

I don't want to have anything to do with this lady. She is a lousy manager. Her people can't stand to work with her. We don't have the equipment or the supplies that we need. The turnover in the OR is outrageous. The best nurses have quit, and their replacements don't know enough to come in out of the

rain. ... All we want is to provide quality patient care, and she refuses to let us do that. She doesn't follow through on things.

He particularly resented Mary's lack of deference.

Mary's behavior is so disgraceful it is almost laughable. She shows no respect whatsoever for the physicians. ... She thinks she can tell us what to do and order us around; and I am not going to put up with it any longer. When I agreed to take this job as chief of surgery, I promised my colleagues that I would clean up the mess that has plagued the OR for years. I have a mandate from them to do whatever is necessary to accomplish that. The docs are sick and tired of being abused, and I am going to deal with this lady head on. If we got rid of her, 95 percent of our problems would go away. She has just gone too far this time.

In his cooler moments, Don admitted that Mary was only partly to blame for the OR's problems, but he still insisted she must be fired, if only to prove to the doctors that the hospital administration was concerned about those problems, and that something was being done.

Observation: I am always a bit suspicious about the objectivity of someone who has reached the conclusion that someone must be fired. There is almost always something else that is going on that requires more investigation.

Mary was both angry and bewildered. She saw herself as fair and consistent in dealing with doctors and nurses:

Things had gone relatively well until six months ago. At that time, some of the orthopods started scheduling surgeries and then canceling them at the last minute, which, in turn, fouled up the schedule for the rest of the doctors. When I called them on it, Don went on a rampage. He is the leader of the pack, and now he has blood in his eyes. I have tried to talk with him about it, but he won't listen.

And just as Don's assessment echoed, in an exaggerated form, the doctors' perception of Mary as an exceptionally strong-willed woman, Mary's assessment of Don echoed his reputation among the orthopedic nurses and hospital administrators, who feared and distrusted his quick temper and sharp tongue:

Not only that, but I find his filthy mouth very offensive. I am not going to cooperate with him when he behaves like that. Nobody else talks to me that way and gets away with it. Nobody, I won't put up with it. As long as he behaves that way, it is a waste of time to meet with him. I am sure that I am doing things that bother him, and I want the OR to run as smoothly as possible. But there is no way we can deal with these problems unless we can sit down and talk about them without being abusive.

Clearly, both Mary and Don had strong needs to control other people's behavior, while remaining free of control themselves. It is significant that each used the word *abuse* to describe the other's behavior. They did respect each other's technical abilities, but morally, Mary saw Don as "an egotistical jerk," and he saw her as a "rigid, petty tyrant." Neither trusted the other, thus, each was inclined to misconstrue even unintentionally negative comments—an especially disastrous state of affairs in the gossip environment at Lincoln, where surgeons, nurses, and administrators were quick to relay, and amplify, the signals of hostility.

It was obvious from these initial interviews that Don and Mary were largely contributing to the OR problems; but it was also obvious that many others had a stake in the outcome of their battle. I therefore went on to interview the surgical head nurses, the vice presidents for patient services and medical services, the executive vice president, the president, and 25 physicians.

The vice presidents and the surgical head nurses agreed with the president: Mary might not be the hospital's most personable manager,

but she was a good one. Her conservative, tenacious, no-nonsense style had earned the trust of administrators and the respect of OR nurses, as well as some physicians. As one nurse asserted: "Good OR managers are hard to find and certainly Lincoln is far better off with Mary than without her."

The doctors, in general, supported Don, though some of them had reservations. At one extreme, an anesthesiologist began with a classic disclaimer:

Now, I want you to know that I don't have any problems with Mary, personally. In fact, I really like her. We have been friends for years, and we get along just great.

Nevertheless, he was convinced the OR problems were "100 percent Mary's fault. I have no doubt about that." Furthermore, although he claimed to be, as an anesthesiologist, "a completely neutral third party in this whole business," he clearly shared Don's assumption that Mary's job as an OR manager was to keep the surgeons happy:

Her people hate her. She is a lousy manager. She just can't work with the MDs. Surgeons are a rare breed, and there is no changing them. You have got to get someone in there who can work with them and give them what they want.

His conclusion echoed Don's: "She ought to be fired, if for no other reason than to prove that something is being done to address the problems in the OR."

Observation: I am always leery of someone who says, "It is all her fault." When someone is blamed for 100 percent of the problem, it usually evidences either denial or a coverup. There may be a completely innocent party in an emotionally charged conflict, but I have never met one. Emotionally charged conflicts are always power struggles, and it takes two parties to play that game.

A less enthusiastic partisan, a surgeon who was a 10-year veteran of the Lincoln OR, was very conscious of the way expectations such as those expressed by Don and the anesthesiologist were apt to be viewed by others in the medical community:

Quite frankly, I am embarrassed to admit that I am a surgeon in this town; by doing so, I am automatically branded as an egotistical dimwit. With only a few exceptions, those guys are a group of conceited, narcissistic technicians who are so caught up with themselves that they have no clue about what is going on around them. Some of them are bullies, and they push the rest of us around because we don't have the patient census they do.

His assessment of blame was correspondingly more moderate than the anesthesiologist's: "A lot of people would like you to think that this problem is one sided, and that Mary is totally responsible for this mess. But that isn't true." And while he supported Don, whom he described as reasonable and willing to listen to logic, his principal wish was to avoid personal involvement: "I am glad he is fighting this battle. I won't. The thought of getting caught between him and Mary scares me to death."

This last wish was vividly elaborated by another surgeon, who also highlighted the general perception of Mary as a strong personality:

I don't mess with Mary at all. I'm not stupid. It's true that I don't like some of the things that she does. Sometimes she is just plain ornery. But I also am not willing to take her on. In fact, at this point, I will do whatever she wants, whenever she wants it. If the other docs are smart, they won't mess with her either. They can talk big in their meetings, but if they have any sense, they won't mess with that lady. She controls too many of the resources I need to do my job. So far she has been very helpful, and she has gone out of her way to do me some favors. I don't want to mess that up. I think it is great that Don is willing to take her on, and I wish him success. That way, if she wins, it will be him that gets beat up, not me.

The high turnover among OR nurses was a particularly sore point among the surgeons in general, whose frustration was explained by Don:

I don't think the administration has a clue as to how urgent this matter really is. It takes at least five years for a surgical nurse to gain the necessary skills to be useful. In the last two months, we have lost some of the best nurses I have ever worked with in my life. As a result, I had to start the training process all over again. It has seemed like I've been working with a group of student nurses! This turnover has cut my productivity by more than 50 percent.

Most of the doctors blamed the high turnover on the nursing managers' inability to retain qualified personnel, whereas the managers blamed it on the doctors' verbal abuse. And in fact, a significant number of doctors were widely regarded by some of their peers as well as by the nurses as impatient, intolerant perfectionists who demanded far more of others than they did of themselves.

From the extended interviews, it was obvious that while Mary had greater credibility with the hospital administration and Don had more backing from the doctors, each had a certain amount of power over the other's constituency: Mary controlled the surgeons' working conditions, while Don controlled a significant portion of the hospital's patient flow. The OR problems could not be resolved without genuine cooperation from both of them—especially from Don, who was outside the formal hierarchy of the hospital and could not be coerced by the president.

I met again privately with each of them to determine whether they were honestly committed to improving their working relationship. Both were skeptical about the possibility of real change but said they were willing to do everything they could to help, as long as their own basic values were not violated. Each defined the kind of help he or she was willing to accept from me and the circumstances under which that help was to be given.

INTERVENTION

Only at this point did actual third-party facilitation intervention begin. I used a design that included perception sharing, problem identification, contracting, and follow-up meetings. At their first formal meeting together with me and the three vice presidents who acted as observers, Mary and Don began by writing answers to three questions:

1. What does he or she do well?
2. What do I think I do that bugs him or her?
3. What does he or she do that bugs me?

The very process of writing things down was helpful. It gave them time to get used to this explicitly confrontational situation before either of them had a chance to "pop off" at the other, and it forced an element of rationality into an emotionally charged situation. Also, the questions required specific answers concerning behaviors, not subjective generalizations about personalities. Listing specific behaviors made each of them realize that at least some of the things they disliked about the other could be changed.

They then explained these responses orally, in the order shown in Exhibit 1. Because of their mutual hostility, I thought it safer to require that at first they address their remarks only to the third party, not to each other. Each, however, was required to hear the other's presentation so each would understand the other's perceptions. And because both were guaranteed an uninterrupted speech, each was more likely to listen to the other. Taking up the positive perceptions first helped. As Don later explained:

I was stunned to hear her say those positive things, particularly the part about me taking care of her family. For a long time, I had seen her as my enemy, and I expected only the worst. I was amazed that she had so much respect for me. As a result, many of my negative feelings for her began to leave. It is really tough to stay angry at someone who says so many nice things about you. I also found that I was much more willing to listen to what

I do that bugs her. Somehow, criticism is always easier to take when it is accompanied by something positive.

It also helped that before making any accusations against each other, they were required to examine their own behavior. As Mary acknowledged, neither had ever taken the time to figure out specifically how he or she might be causing problems for the other:

It had never really occurred to me that I may be doing something that caused Don to react that way. Vaguely, I suspected that I may be doing something that he didn't like, but I was hard pressed to identify what it was. I really had to stand back and say to myself, "What is it that I am doing that is making this working relationship go sour?" I had spent so much time concentrating on what he was doing that bugged me that I hadn't looked at myself.

The oral discussion of this question made it obvious that neither was intentionally causing problems for the other, making both parties less hypersensitive to imaginary insults. Also, because both were much harder on themselves than they were on each other, the milder criticisms they did subsequently direct at each other were not nearly as offensive as they would otherwise have been.

The next step was to identify specific problems for Mary and Don to address. They wrote their responses to question three on a sheet of newsprint, assigning vectors to represent the relative seriousness of the problem. Some of the most serious problems could be resolved immediately; others were going to take longer, but at least Don and Mary now knew what their priorities had to be.

Finally, it became possible for them to agree on specific behavioral changes that might help. Don and Mary each defined what they wanted from the other and negotiated what they themselves were willing to undertake; I moderated the meeting and wrote down the decisions. (At the end of the meeting, Don, Mary, and the three observers each received a copy of these commitments.) Because Mary and Don

[Exhibit 1]**Participant Responses to Three Questions in the Third-Party Facilitation Model**

1. What does Mary admire about Don and think he does well?
 - He is very concerned about patient care.
 - I admire him for his skills as a surgeon. I would have no problem sending a member of my family to him.
 - He is interested and wants to work out issues that we have with each other.
 - He can be very gentle and considerate at times.
 - He is well respected for his skills by his peers and by the OR nursing staff.
2. What does Don admire about Mary and think that she does well?
 - She is honest in her work.
 - She has met my needs in orthopedics in getting us the instruments and equipment we need.
 - She has a lot of external pressures on her and she has handled them well.
 - She deals well with the various groups that are pulling at her: patients, staff, administration, physicians.
 - She manages the overall picture very well in the OR.
3. What does Don think he does that bugs Mary?
 - I am impatient. (Mary agrees)
 - I am demanding of personnel in surgery, but everyone can't always get what they want, when they want it. (Mary disagrees)
 - She is uncertain as to how much I am willing to support her this coming year. (Mary agrees)
 - I am not the best listener. (Mary agrees)
4. What does Mary think she does that bugs Don?
 - I don't listen to him. (Don agrees)
 - I appear defensive at times. (Don agrees)
 - I respond to some directives in a very detailed manner. (Don agrees)
5. What does Mary do that bugs Don?
 - She is difficult to communicate with. I can talk to her, but I am not sure that she is listening.
 - She doesn't assume the responsibility for some specific problems, such as not being able to do an operation without a full set of prosthesis available.
 - She doesn't effectively manage the personnel that she supervises in OR. Specifically, there is a great deal of disruption going on. And there are also morale problems, particularly as they relate to their trust of her and her trust of them in the OR.
6. What does Don do that bugs Mary?
 - He generalizes and is not very specific with examples, even when questioned.
 - The staff labels him as a whiner, in terms of "nothing is ever right," his complaining, etc. This also relates to laying out problems and then walking away.
 - He sometimes says one thing but means another—and gives mixed messages. An explanation of this is my asking him how things are going, he says fine, but then I find out that he has problems later in the day.
 - I do not feel a full measure of support from him, and that bugs me.
 - He doesn't always listen to my concerns.

are interdependent, either could easily have sabotaged the other's efforts. Therefore, in planning each action item, I reminded them to specify responsibilities for both parties:

- What will Don (Mary) do to resolve this problem?
- What will Mary (Don) do to help the other succeed?

This technique made both parties jointly responsible for resolving each problem and thus changed the whole dynamic of the relationship—from mutual isolation to collaboration, from denial of responsibility to acceptance of responsibility, and from a focus on problems to a focus on solutions.

During the next year, I had four more meetings with Don, Mary, and the three vice presidents. Before each meeting, I interviewed each participant privately. At the beginning of each meeting, the participants gave general reports on what was going on, between Mary and Don and in the OR in general. In particular, I asked the two to list positive events and specific behaviors on each other's part that

they appreciated. They then reviewed the commitments they had made during the previous meeting. In almost every case, both Mary and Don had kept these commitments, thus building a basis of trust for further commitments during the latter part of the meeting. Where they had not kept the commitments, plans were made to ensure follow-through before the next meeting.

Questions

1. If you had been called by Lincoln's president to help resolve the problems described in the case, how would you have carried out the contracting and diagnosis stages? What would you have done differently than what the OD consultant did?
2. Is third-party intervention an appropriate intervention in this case? Other possible OD interventions?
3. How effective was the third-party intervention? Next steps?

SOURCE: R. Wayne Boss, *University of Colorado*; Leslee S. Boss, *Organization Research and Development Associates*; Mark W. Dundon, *Sisters of Providence Hospital*.

Ben & Jerry's (A): Team Development Intervention

"Two real guys," Ben Cohen and Jerry Greenfield, head Ben & Jerry's Homemade Inc., an independent ice cream producer that has gained market share and public approbation against industry competitors Häagen-Dazs (made by Pillsbury), Frusen Glädjé (made by Kraft), and Steve's. The story of the founders has a romantic, antiestablishment quality to it that reads like a new-age entrepreneur's dream.

The "boys," childhood friends, each dropped out of college in the late '60s, worked at odd jobs for a time, and together opened a small ice cream scoop shop in Burlington, Vermont, in 1978 with scant know-how (they learned ice-cream making through a \$5 correspondence course) and less capital (they started with \$12,000—a third of it borrowed). But they had something else going for them: a combination of old fashioned values and new-fangled ideas.

Neither Ben nor Jerry had any intention of becoming businessmen. From the start, however, both were committed to making the best ice cream possible and to having fun while doing it. More than this, these "self-styled Vermont hippies," as the press calls them, were committed to the simple notion that business draws from the community and is obliged to give something back to it. In the early days, this meant giving away ice cream to loyal customers and worthy charities. As the company grew to sales of near \$50 million, B&J's embraced what it calls a *social mission* to improve the quality of life—not only of employees, but also locally, nationally, and internationally—and to do so in an innovative and upbeat way.

The economics of B&J's show fast-track growth over the past several years characteristic of very successful startup companies (see

Exhibit 1 from the 1988 annual report). Sales doubled annually from 1984 to 1986 and increased nearly 50 percent from 1987 to 1988. The company is today the super-premium market leader in Boston and New York City and distributes its products in grocery stores and mom-and-pop convenience outlets in Florida, the West Coast, and parts of the Midwest. Some 80 franchises operate scoop shops in these markets, and the company's "pints" manufacturing facility and headquarters in Burlington have become Vermont's second-largest tourist attraction with over 600,000 visitors annually.

In addition to expanding this facility, B&J's recently built a novelty plant in Springfield, Vermont, to manufacture ice-cream brownie bars and stick pops and leased space to house its marketing, franchising, promotion, and art departments. Today, over 350 people work at B&J's. Production runs around the clock, staffed by a few dairy experts and many more offbeat people who gravitated to the company because of competitive wages, its funky image, and its social mission. Among the production staff is a team of handicapped employees who have distinct and important responsibilities.

The product side of B&J's blends what *Time* magazine calls "incredibly delicious" ice cream. The story goes that Ben has deficient taste buds, so products have to be particularly pungent to stir his palate. This means "double-fudge" and "big-chunk" add-ins to the ice cream. Funky flavors, like "Cherry Garcia," an assortment of T-shirts, Vermont "cow" paraphernalia, and wacky promotions all make word-of-mouth marketing the key to B&J's commercial success. And, yes, the founders insist on having fun. At annual meetings, Jerry, trained in carnival tricks, uses



[Exhibit 1]

Annual Report 1988: A Report to Shareholders, Customers, Community Members, Suppliers, and Employees

Five Year Financial Highlights (in thousands except per share data) Summary of Operations:

	Year Ended December 31				
	1988	1987	1986	1985	1984
Net sales	\$47,561	\$31,838	\$19,954	\$9,858	\$4,115
Cost of sales	33,935	22,673	14,144	7,321	2,949
Gross profit	13,627	9,165	5,810	2,537	1,166
Selling, delivery and administrative expenses	10,655	6,774	4,101	1,812	822
Operating income	2,972	2,391	1,709	725	344
Other income (expense)—net	(274)	305	208	(31)	(13)
Income before income taxes	2,698	2,696	1,917	694	331
Income taxes	1,079	1,251	901	143	118
Net income	1,618	1,445	1,016	551	213
Net income per common share (1)	\$.63	\$.56	\$.40	\$.28	\$.12
Average common shares outstanding (1)	2,579	2,572	2,565	1,991	1,724

Balance Sheet Data:

	Year Ended December 31				
	1988	1987	1986	1985	1984
Working capital	\$5,614	\$3,902	\$3,678	\$4,955	\$676
Total assets	26,307	20,160	12,805	11,076	3,894
Long-term debt	9,670	8,330	2,442	2,582	2,102
Stockholders' equity (2)	11,245	9,231	7,758	6,683	1,068

(1) The per share amounts and average shares outstanding have been adjusted for the effects of all stock splits, including stock splits in the form of stock dividends.

(2) No cash dividends have been declared or paid by the company on its capital stock since the company's organization and none are presently contemplated.

a sledgehammer to break a cement block over the stomach of the mystical "Habeeni Ben Coheeni."

It is, however, the social mission of B&J's that most distinguishes it from corporate America. The good works of the company are many and range from regular donations to community

and social action groups to a commitment to buy only Vermont-based cream from area dairy cooperatives. B&J's embraces socially responsible marketing and has proposed to "adopt a stop" in the New York subway system (which the company would clean and maintain in lieu of advertising) and begun an innovative joint

venture with the Knowledge Society in the Soviet Union.

Recently, the company introduced "Peace Pops" as part of the "1% for Peace Campaign." This effort is aimed at encouraging other businesses to join a movement urging the government to devote one percent of the defense budget explicitly to peaceful purposes. A new product featuring Brazilian nuts obtained at above-fair-market price from native Brazilians is further evidence of the founders' social commitments.

INNOVATING INSIDE OF B&J'S

Ben and Jerry have been at the edge of innovation since the company went public. Rather than seeking venture capital to expand the business, they drew up a stock prospectus on their own and sold shares to Vermonters door to door. One in every 100 Vermont families bought in to the tune of \$750,000. When Häagen-Dazs tried to pressure shopkeepers to keep "Vermont's finest" off their shelves, Ben and Jerry started a grass-roots campaign against Pillsbury replete with bumper stickers (What's the Doughboy afraid of?) and a one-person picket line (Jerry) at the Pillsbury headquarters.

Ben and Jerry have tried to introduce this same funky and socially responsible orientation inside the company. The company's mission and many of its policies and practices (see Exhibit 2) reflect the upbeat and caring values of the founders. A policy of "linked prosperity" ensures that 7.5 percent of pretax profits go to good works and five percent is returned to employees via profit sharing. The salary ratio between the top paid and least paid in B&J's is set at five to one. This means, if managers want to earn more, they have to increase the base wage throughout the company.

Employees come in all shapes and sizes. Most are young (under 30) and many have responsibilities well beyond their experience. It is a matter of pride to all that B&J's can speak, act, and dress "like themselves." Still, the

work is demanding and the pace frenetic. The production room is often awash in cream, and the freezer crew works in chilling conditions. There is nothing akin to market research in the company, demand is fluid and unpredictable, and when I first arrived on the scene, the franchising and sales managers weren't communicating with each other and neither paid attention to the marketing director.

In 1987, it became evident to Ben and Jerry, as well as to managers and employees, that the company's external image—of funk, fun, and love—was out of sync with the atmosphere inside the company. The company was always short on ice cream and long on hours, pressure, and problems. The author was commissioned to work with the founders and board of directors and with the management and work force of the company to undertake organizational development and bring people, functions, aspirations, and directions together.

ENTRY

Henry Morgan, former dean of the School of Management at Boston University and board member at B&J's, contacted me about this project. Henry comes from a long line of New England activists deeply committed to the improvement of the human condition. His family lineage traces to Hawaii where ancestors were missionaries, and Henry has had a career as an entrepreneur, management innovator, and social investor. In addition to his membership on B&J's board, he is active on other boards and is a leader in the Council of Economic Priorities' efforts to promote corporate social responsibility.

Entry through Henry, however, posed some risks. For example, like Henry, I was an outsider coming into B&J's where the emphasis, to this point, had been on "homegrown" innovation. Ben, Jerry, and Jeff Furman, an attorney and longtime B&J's counsel, had

[Exhibit 2]

Ben & Jerry's Mission and Operating Principles

Ben & Jerry's, a Vermont-based ice-cream producer, is dedicated to the creation and demonstration of a new corporate concept of linked prosperity. The company has three central missions and several key operating principles.

Three Missions

Product Mission: To make, distribute, and sell the finest quality all natural ice cream and related products in a wide variety of innovative flavors made from Vermont dairy products.

Economic Mission: To operate the company on a sound financial basis of profitable growth, increasing value for our shareholders and creating career opportunities and financial rewards for our employees.

Social Mission: To recognize the central role that business plays in the structure of society by seeking innovative ways to improve the quality of life for a broad community—local, national, and international.

Operating Principles

Linked Prosperity: "As the company prospers, the community and our people prosper." 7.5% of pretax profits go to the Ben & Jerry's Foundation for distribution to community groups and charities. Five percent of profits are put into a profit-sharing plan. Five to one salary ratio between top management and entry-level production workers. To raise top pay, raise the bottom up.

Community Development: "Business has the responsibility to give back to the community." Donations of ice cream by request to all Vermont non-profit organizations. Leveraged assistance where B&J will help non-profits stage fund-raisers selling Vermont's finest ice cream.

Ownership Perspective: "Everybody is an owner." Employee stock ownership, stock grants, and stock purchase plan. All-company "town meetings" monthly.

Integrity: "Two real guys." All natural products. Commitment to Vermont Dairy Cooperatives. "What you see is what you get." People can speak, act, and dress as they wish.

Work Hard/Have Fun: "Bend over backwards." Pledge to meet orders, satisfy customers, make things right for people. "If it's not fun, why do it?" Company celebrations. Jerry's Joy Committee to spread joy in the workplace.

Human Activism/Social Change: "A model for other businesses." One percent for Peace Campaign. Socially responsible marketing. Joint ventures in Israel and Moscow to spread goodwill.

crafted the company's innovative employment and investment policies. It was unclear to me what these three really wanted from an OD program. Was I being brought in to get management "aligned" behind the founders' guiding precepts as a phone conversation with Ben intimated? Or were the precepts themselves open to question and modification via management and employee input? If so, did it require an outsider to stimulate this reexamination? Or was I being set up?

To complicate matters, there was a division in the board of directors. Ben, Jerry, and Jeff were rather more "far out" in their aspirations for the company, particularly in comparison to the more conservative general manager, Fred "Chico" Lager. The former anticipated an outpouring of good vibes once "people power" was unleashed. Chico had more everyday concerns: feuding between management, unclear lines of authority and responsibility, a lack of operational control. More specifically,

as an example, a freezer door was broken and neither the freezer, nor maintenance, nor production managers claimed ownership of the problem or took responsibility to see that it was fixed. That, to him, was symptomatic of an undeveloped organization.

Finally, there was the matter of defining OD. Neither Ben nor Jerry nor the board had any inkling about what OD is and what OD people do. I had to educate them about the field and make some kind of action proposal. This would mean getting to know people, getting a handle on their hopes and their problems, and learning something about the icecream business and conditions in the marketplace. Where to start? I went to a board meeting to check out members' hopes for organization development and what they wanted from me.

FIRST BOARD MEETING

Ben

I want our people to love their work and have positive feelings about the company. Love, soul, kindness, consideration, generosity, fairness, heart.

Jerry

I want a feeling of togetherness and family feeling ... I'd like staff to feel it was their company.

Jeff

I'd like to see spirit and energy to make a difference in the world ... plant seeds of new and different possibilities of looking at our culture and world. Not corporate America.

Chico

Something special and unique that is making new ground, that will be studied and appreciated years to come.

Henry

More open communication, listening at the top. More buy-in to shared values. Showing respect for the individual.

Merritt

Awakened enthusiasm, accomplishment, high morale.

At this first meeting, I asked board members to state their vision of the ideal organization and hopes for the OD effort. Ben and Jerry talked of peace, love, family feeling, and good vibes. Jeff was on a different wavelength: He articulated a political vision where B&J would be an exemplar of a radical new kind of organization. Chico spoke about innovativeness and excellence, without the radical chic or global emphasis. Henry's hopes were addressed to better human relations and human resource management. Merritt, another businessman cum board member, expressed similar sentiments.

I had the board members write their visions on sheets of paper, and then together we burned them to symbolize how energy and togetherness could transform things. Some chanting added to the ritual. It must have seemed a bit hokey to the board, but I have my own preferences and style of doing things and wanted to illustrate my own offbeat inclinations. In any case, Ben had offered me a wizard's hat to signify his vision of my role. The fire trick fit the costuming.

That night, however, I had some misgivings. It was clear that, when pressed, neither Ben, nor Jerry, nor any board member save Chico would provide the day-to-day leadership needed to move development through the organization. On the contrary, the founders wanted to hand off the responsibility to Chico and his to-be-formed management team. My job was to help bring that team into being and to ensure that the team took leadership of B&J's business and social missions. It was also to help bring the work force together in as-yet-undefined ways.

Should I start my work at the top? I had an inkling that the board was not aligned behind any one definition of Ben & Jerry's. However, the board was not, at this time, asking for assistance with its work nor could the members openly talk about problems within the group. The problems, in board members' eyes, rested within the organization. That made Chico and his team the natural focus of

intervention. Chico, at this time, had 20 managers reporting to him, with responsibilities ranging from running the manufacturing plant to handling orders for T-shirts and other B&J paraphernalia.

Still, I worried whether OD would directly reach the work force. If I worked from the top down, it might take months (years) to have a direct bearing on people's work lives. The production workers were full of ideas, I was told, and eager to become more involved. Maybe some form of quality-of-work-life program was in order wherein employees could take active responsibility for problem solving in their own areas of responsibility. My question: Were managers and supervisors ready for this?

The next step was to do some fact-finding in the company. I arranged with Chico to conduct interviews with all of his 20 managers, tour the plant, talk with production workers and sales personnel, and generally sniff around. That would lead to a diagnosis of the organization and an action proposal.

DIAGNOSIS

Three months of interviews with key managers and staff at B&J's showed the following areas of strength and concern in the company:

Strengths:

- High commitment to the company and its mission.
- Norms of honesty and straightforwardness.
- Smart and articulate management.
- High interest in growth and learning.
- Founders and general manager as role models.

The interviews affirmed the positive public side of B&J's: Managers and employees were wholly dedicated to the company. Many of the managers had left successful jobs in other companies to come to B&J's because of its funky atmosphere, freewheeling style, and socially responsible orientation. Some had taken salary cuts to come aboard. The managers

were smart and each had his or her own view of how the company should develop. These views, taken together, pointed to a more participatory style of management with people charged with higher levels of responsibility. This would require more training, of managers and supervisors, in both technical and managerial areas. They would also need to get organized—with more clarity about who was doing what and why.

The interest was there. Everybody I spoke with was eager to learn more and get better at their jobs. The commitment was also there. Many professed deep feelings of connection to Ben and Jerry and were inspired by the chance to take "their company" and run it. They also looked to Chico to teach them the ins and outs and looked forward to working closely with him as part of the "management team."

Concerns:

- People and systems not keeping pace with growth.
- Lack of clear structure, roles, and teamwork.
- Lack of common mission, direction, priorities.
- People are stretched to the limit.
- Founders and general manager are both company's greatest strength and greatest weakness.

The roster of concerns shows that Ben & Jerry's was underorganized for handling the challenges posed by rapid growth in the marketplace and work force. Interviewees talked about the absence of clear goals and agreed-to priorities, problems of communication and coordination, tasks half-finished and new initiatives begun, then dropped. No one had the time to get on top of things or ensure follow-through.

Furthermore, the interviewees depicted the founders and general manager as both the company's greatest strength and its greatest weakness. To this point, Ben and Chico had access to the most relevant information and called most of the shots. But conflicts between the two were legend. Ben would push for better quality, faster flavor development,

funkier ads and promotions, while Chico would urge pragmatism, shuffle priorities, mediate tensions, and hawk expenses.

These two titans seemed to be omniscient: They handled hot problems and made all the right moves. But nobody knew how they worked things out or got things done. It was plain enough, however, that the to-be-formed management would have to set more of the direction, solve more of the problems, and develop systems for control and follow-through if participatory management and decentralization were to be accomplished. Furthermore, they would have to get closer to one another personally and develop more trust and confidence in one another, if family feeling and pride of ownership were to prevail.

Thus I pitched the OD effort at helping the board of directors to clarify the company's mission and to cede operating responsibilities to management. In turn, the board was to empower managers to run the company in a strong, unified, and responsible fashion. There were pragmatic issues to address: the managers did not see themselves as a team nor had they worked together to formulate goals and establish roles and responsibilities.

There were also matters of principle on the agenda: many managers had no prior experience leading a company so dedicated to social responsibility. Several, frankly, did not fully buy into socially oriented company policies, including the active association of the company with the 1% for Peace Campaign and the salary ratio of five to one between the highest and lowest paid members of the corporation. A few were chafing at the mandate of the founders to have "fun" at work while still achieving record rates of production at superior quality standards.

TEAMBUILDING VIA A RETREAT

The 20 managers and Chico went to an offsite retreat where all were blindfolded and roped together in their three work-related clusters

and then charged with locating three inner tubes symbolically lashed together maybe 75 yards away. The members of each cluster shouted out instructions or demanded them, took stabs at leading and then pulled back in frustration, while the other groups stumbled along vainly searching for the "goal." One group finally located the tubes, then cheered for their own success and chided the other groups. This experience provided a window into current dynamics in the company and led us to examine teamwork, competition, and cooperation during the rest of the retreat.

Thereafter, the managers climbed ropes, worked on problem-solving initiatives, and trekked in the out of doors, all in the service of finding new ways to work with one another. One evening they talked about their personal lives and values through the medium of "mind maps." Everyone recorded on a silhouette the persons and events that had most shaped their character, how they wanted to be thought of in the company and by their peers, and what mark they wanted their life to leave behind. Several spoke of their scarring experiences in Vietnam, their poignant efforts to cope with family trials, the impact their mothers, fathers, and now their spouses and children had on them. Many cried. There were hugs and cheers.

The next evening, the clusters had the opportunity to put on skits about their part of the organization. The manufacturing cluster drew from a popular game show to show their peers the "jeopardy" involved in making high-volume, high-quality foodstuffs. The marketing and sales group selected a member to wear the beard of one of the founders and joined him in songs and dance about the foibles of competing with less socially responsible companies and the seeming folly of having fun at work.

The search for the inner tubes was repeated at the end of the retreat. The groups quickly joined forces with the others to analyze the problem, work out a plan, figure out roles and

responsibilities, and establish procedures to stay in touch with one another. They reached the goal in one third of the time. The retreat concluded with each attendee selecting a "system" to represent his or her experiences and developing a personal action plan to be implemented in the months ahead.

WHY TEAMBUILDING?

Three reasons for recommending teambuilding to launch the OD effort at B&J's were threefold. First, it was crucial for managers to begin to think of themselves as managers and as members of a management team. Many of the managers at B&J's were truly supervisors, who worked alongside employees and focused only on the work going on in their own area of responsibility. To cope with growth, it was essential for them to begin to plan, set priorities, and coordinate efforts with one another. This meant they had to operate like real managers and become a management team.

Second, the managers would be assuming new responsibilities heretofore in the hands of the founders and general manager. I thought it important for them to see how much they had in common and how much affinity they had with the founders' vision of the enterprise. Teambuilding provides a good medium for self-disclosure and helps people to open up about who they are and what they believe in. The mind maps and skits were designed such that people could see how they were all in this together. Needless to say, lashing them together to search for an inner tube was a more literal translation of the message.

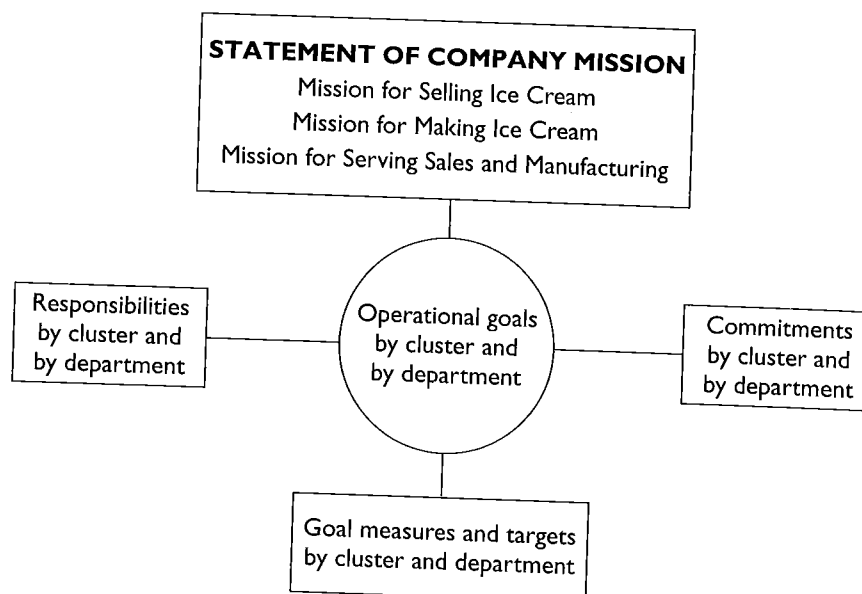
Finally, managers had to collectively commit to taking on new responsibilities and learn new methods for working together. The several exercises at the retreat were aimed at educating them in group management and problem-solving skills. The ropes course, in turn, emphasized the importance of personal courage and peer support in tackling the unknown.

The managers left the retreat closer and charged up about running the show.

However, the rationale for beginning OD with teambuilding was rather traditional and conservative in character. Many OD proponents eschew the top-down approach to development and work simultaneously at many levels in a company. Work teams and worker-management committees are starting points for OD in many organizations. The aim is to get as many people as possible, as soon as possible, involved in organizational improvement. The risk with going company-wide with OD from the start is managerial resistance. Frankly, in this case, I didn't think managers were ready to respond to group problem-solving initiatives by their subordinates and teams. They were not conversant with techniques like brainstorming, force field analysis, and contingency planning—requisites for team leaders. Nor were they ready, in my judgment, to cede responsibility as they were just assuming more of it. Instead, my proposal was to go slow, get management organized and built into a team, and then push OD downward.

FOLLOW UP: GOALS AND RESPONSIBILITIES

This began months of teambuilding with the newly created management group (see Exhibit 3). Each working cluster was charged with developing a mission statement for its area of responsibility. The cluster groups met several times to translate these into operating goals. The manufacturing group, for example, focused on improving production capacity and quality. Managers from the freezer, production, distribution, and maintenance departments then analyzed work flow, identified their respective responsibilities, and made commitments to one another to maximize capacity and ensure quality standards. The marketing group, in turn, formed a steering committee to bring franchising and sales together and developed a system

[Exhibit 3]**Management Teambuilding Model for Clusters and Departments**

to control competing pressures on the art department.

In turn, managers also met with their work groups to gather input and incorporate suggestions. In that way, at least, employees were kept abreast of developments and had a chance to be involved. A safety committee was created, staffed by managers and workers, to address a broad range of concerns throughout the plant and headquarters facility.

Several meetings were held to coordinate cluster goal setting. At one session, managers drew pictures illustrating the degree of alignment between functions and the overall vision of the company. One artist depicted the founders as the sun, the functions as orbiting planets, and the market as a streaking comet. Others used stick figures to show the company coming together, people cheering, and craziness all around.

What resulted from these sessions was a series of cluster goal statements, an action agenda

for the next year focused on tasks and goals, and closer interpersonal and work relationships. Did teambuilding make a difference? Managers rated themselves as much more of a team and the functions say they are far more aligned:

*Understanding of the Goals and Direction
of Your Department?*

At the start of the process:	3.5 out of 10.0
At this point in the process:	7.5 out of 10.0

*Relationship with Other Members
of the Management Team?*

At the start of the process:	5.1 out of 10.0
At this point in the process:	7.5 out of 10.0

CROSS-TALK

Despite the progress in organizing management, the founders worried whether the funk and fun was being lost in all of this business. There was a heated debate between managers and the founders over growth. The

founders hoped to limit growth in order to keep the company small and people connected. Managers pointed out that existing marketing and franchise commitments would require growth and that B&J's simply could not stiff its customers. Back and forth the talk went. It seemed as though the managers had become something of a threat to the founders, who were having trouble letting go of promised authority.

Ben and Jerry then took the initiative to "lift up" the cluster goals into a unifying statement of the company's economic, product, and social mission. To air differences, the newly formed management team and founders then met to examine their differences. Before the meeting, Ben had said publicly that management "wasn't weird enough" and expressed worry that the company's social mission was being sacrificed to growth. The managers first chafed at his inference that they weren't interested in the social mission. Then they took his concerns to heart. Each member of the management team came to the meeting wearing a mask bearing the likeness of either Ben or Jerry and buttons saying "We are weird."

Together, managers and board members talked over issues of trust and relative powers with the founders, fleshed out how management and the board would work together, and made a pact that the company would remain

committed to high quality production, good works, and fun.

Following the session, several actions were initiated to bring neglected aspects of the mission statement to life. A "Joy Committee" was established to ensure that spirit was kept alive in the company. It hosted lunches, sponsored social events, and launched several happenings throughout the company. Employees were encouraged to take a more active part in the Ben & Jerry's Foundation and contribute directly to charitable giving. Finally, a budget committee was created to formulate B&J's first one-year plan.

Questions

1. Team building is typically used in OD to loosen up an over-organized system that is too rigid and bureaucratic. In this case, team building was aimed at providing structure to an under-organized system. In doing a diagnosis, what factors are important to consider in determining whether a company or team is over- or under-organized? What are the implications for planning an OD intervention?
2. Is team building a good way to launch an OD effort in this case? Other approaches?
3. What next steps would you recommend?

SOURCE: Philip H. Mirvis, *Boston University*.