

## CHAPTER TWELVE

# Summary of Socio-Technical Influences and the Implications for a Synergistic MD/OD Project

## INTRODUCTION

### What This Chapter Is About

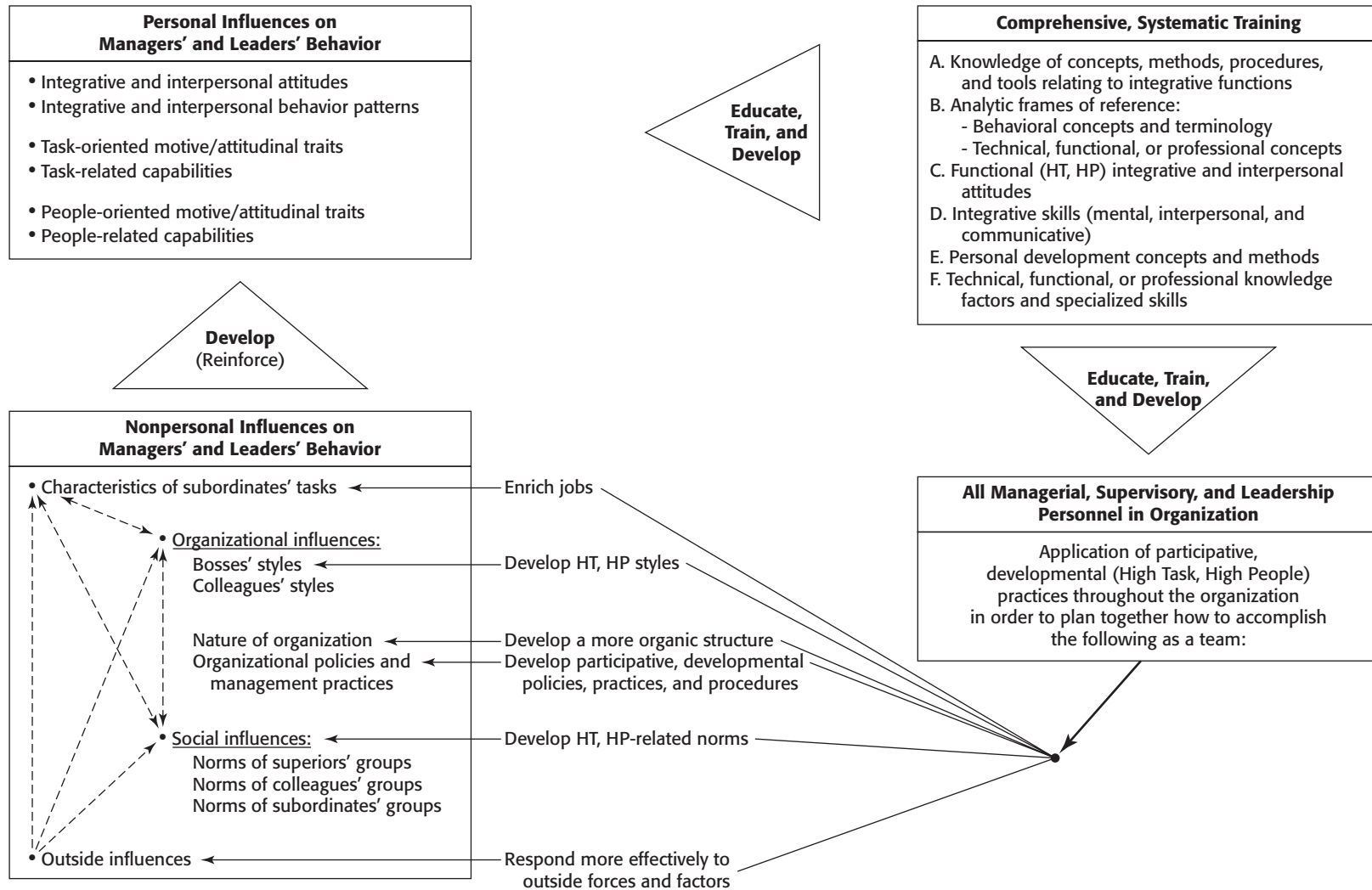
Change is inevitable, continuous, and often overwhelming. Organization development involves change. Organizational change cannot be managed successfully unless managers are aware of and able to deal with many factors that affect their own and their subordinates' abilities and motivation to change. For example, Madsen, Miller, and John (2005) found that social relationships both inside and outside an organization can affect all personnel's readiness for change. Rashid, Sambasivan, and Rahman (2004) found that organizational culture and cognitive and attitudinal phenomena also affect people's readiness. Elenkov and Manev (2005) found that views held by managers or leaders also influence their own readiness for (and to) change.

The first of this chapter's four sections resurrects Figure I.1 from the book's Introduction. Then, using discussions in Chapters Eight through Eleven of many personal and nonpersonal socio-technical influences on personnel's motivation, attitudes, and behavior, it presents an additional model that helps explain why improving the influences of personal and nonpersonal socio-technical factors calls for more synergistic (as well as integrated) management development and organization development (MD/OD) programs.

The second section briefly reviews the book's integrated MD/OD project's phases: first performing OD preparation steps and then conducting the seven-module training program, including the superior-subordinates sessions that follow each module's training sessions.

The third section briefly reviews some of the basic design considerations that were discussed in detail in Chapter One.

The fourth section discusses two considerations in MD/OD project design that were mentioned in Chapter One but must be discussed further within the context of socio-technical phenomena



**Figure 12.1. Basic Inputs and Activities for Developing Managers and Organizations**

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described in Part Two: using a synergistic approach and involving participants from all levels and units of an organization.

### **What Consultants, Trainers, and Facilitators Can Get Out of This Chapter**

Organization development practitioners can help an organization and its managers design a system for continually developing the talent it will need over time. After studying this chapter, consultants, trainers, and facilitators should be able to help participants identify, plan, and implement ways to

- Build a corporate culture and climate that encourages learning and development
- Develop individuals and the organization in line with the organization's strategic objectives

### **What Practicing Managers, Participants, or Students Can Get Out of This Chapter**

After studying and discussing this chapter, the student or seminar participant should be able to

- Identify and understand how many personal and nonpersonal socio-technical variables are influencing the motivation, attitudes, interactions, behavior, and performance of superiors, colleagues, and subordinates
- More effectively participate in dealing with personal and nonpersonal socio-technical factors that are exerting dysfunctional influences on motivation, attitudes, behavior, interactions, and performance throughout the organization
- Identify the specific knowledge factors, attitudes, skills, and behaviors that should be improved or further developed in subordinates
- Effectively use an approach that prepares all personnel to participate effectively in developing themselves, their subordinates, and the organization as a whole
- Better apply practices and behaviors that will support and reinforce developmental efforts throughout an organization

### **How Instructors and Participants Can Use the CD-ROM's Supplementary Materials**

The accompanying CD-ROM contains the following materials for Chapter Twelve:

- *Chapter Twelve Study Guide.* This class or seminar session preparation guide should be completed by students and seminar participants in order to prepare them for training sessions and the superior-subordinates discussion, OD application, and team-building sessions following this chapter.
- *Thumbnail Organizational Influences Inventory.* This abbreviated checklist helps personnel inventory and focus on major influences on unit and organizational behavior. It relates to elements illustrated in Figure 12.1.

In addition, the following material (found with the Chapter Three content on the CD) is relevant for this chapter:

- *Table 3.1: Checklist of Socio-Technical Factors That Influence Organizational Behavior.* This checklist should be used during class or seminar sessions and during the superior-subordinates,

OD application, and team-building sessions that follow the completion of Part Two, the training portion of Module 2. It helps participants analyze situations and identify which variables might need changing, improving, or further developing.

## ADDITIONAL CONTEXTS FOR ORGANIZATION DEVELOPMENT

### OD and Long-Term Organizational Success

Figure I.1 (page 4) put the concept of this book into an initial overall context. It showed that managerial, supervisory, and employee education and training is the foundation for developing more professional (sophisticated and skilled) personnel. Establishing this foundation requires conducting a management development program that has been strategically designed to serve two purposes: (1) to further develop individuals' integrative and interpersonal knowledge and skills, and (2) to provide a context and vehicle for bringing about significant and enduring organizational improvements that reinforce MD and OD efforts.

### Synergistic, Socio-Technical MD/OD

Figure 12.1 illustrates basic inputs and activities for developing managers and organizations. It shows (a) a number of the most significant personal and nonpersonal socio-technical variables that influence managers', supervisors', and workers' behavior, and (b) several important cause-effect relationships among them.

The top left corner of the figure reviews the basic personal influences on managerial and leadership behavior that were discussed in Chapter Ten: integrative and interpersonal attitudes, and integrative and interpersonal behavior patterns. As you will recall, four areas of inputs on The Managerial Target® underlie those attitudes and behavior patterns: task-oriented motive/attitudinal traits, task-related capabilities, people-oriented motive/attitudinal traits, and people-related capabilities.

The top right corner of the figure shows various managerial education and skill development activities that are typically aimed at increasing or improving those basic personal inputs. These activities cover all five of the following inputs, which were identified by Campbell, Dunnette, Lawler, and Weick (1970):

- General management and supervisory training (can include items A, B, C, D, and E)
- General human relations training (can include items B, C, D, and E)
- Training in problem-solving and decision-making concepts, methods, tools, and skills (can include items A, B, D, and E)
- Practical workshops (such as the ones conducted during the class or seminar sessions and superior-subordinates discussion, OD application, and team-building sessions of this book's MD/OD program)
- Specialized technical, functional, or professional training programs (such as those dealing with topics or areas in items B and F).

It is possible to do comprehensive, systematic education and development in all the indicated areas. Most of the same inputs are also mentioned in Figure 11.1 (page 262) and on The Managerial Target (Figure 10.4 on page 220). (These and related areas are also mentioned in Figures 13.1, 15.2, and 17.1, which are all eventually summarized in Figure 18.2.)

Educational efforts, however, are not the only influences on managers' and supervisors' behavior. As shown in the bottom left corner of Figure 12.1, a number of key nonpersonal *socio-technical factors* discussed in Chapter Nine also affect their behavior:

*Characteristics of subordinates' tasks.* As mentioned in Chapter Nine, when their subordinates' tasks are mechanistic, managers and supervisors are influenced by many related factors and phenomena to behave in a more authoritarian manner. On the other hand, when their subordinates' tasks are very organic, managers and supervisors are influenced to behave in a more consultive or participative manner. As also mentioned in Chapter Nine, the natures of jobs are significant for another reason: they affect the characteristics of personnel, organizational structures, managerial or leadership styles, social interactions, and other very influential socio-technical variables.

*Organizational influences.* If, for example, *superiors' styles* are mechanistic (Theory X or authoritarian), their subordinates are also influenced to behave in an authoritarian manner. If their *colleagues' styles* are mechanistic (directive and controlling), they are influenced to behave in a directive and controlling manner. If all these individuals' styles are mechanistic, it is very difficult for a manager to behave in a more participative, developmental, or team manner. If the *nature of the organization* is mechanistic (has very formal structures, practices, and procedures that are usually aimed at directing and controlling mechanistic tasks at the bottom of the organization), then those structures, practices, and procedures definitely reinforce mechanistic boss-subordinate and coworker relationships. Of course, the opposite is true when organizational variables foster more organic structures and systems and more participative practices.

*Social influences.* These can affect other socio-technical variables such as job-related communications, personnel's attitudes, managers' perceptions of subordinates' natures, and organizational policies and practices. If, for example, the group norms operating among superiors and colleagues are directive and controlling ("Don't let your subordinates get away with anything") and essentially macho ("Be a man; be decisive and dominant"), they will push managers to behave in a more Theory X manner. If subordinates' group norms are rather masculine, a manager may conclude that macho behavior is all that subordinates will understand and respond to. On the other hand, if the norms of groups are to cooperate with each other, share information, and interact congenially, these normative attitudes and associated behavior patterns will contribute to team-oriented behavior.

*Outside influences.* These factors can affect the natures of jobs throughout an organization. For example, it may be that marketplace and technological forces are exerting mechanistic influences on the natures of jobs and personnel's interactions (thereby making it necessary for the organization to formulate operating and marketing policies and procedures to deal more organically with those influences). External influences also include sociocultural forces exerted by family, religious institutions, and so forth. These affect personnel's values, beliefs, biases, and other attitudinal characteristics.

The main point is this: If an organization uses management education and development to influence managers and their subordinates to behave in a more team, participative, and developmental manner, but all the major nonpersonal factors are influencing managers and supervisors to behave in a more directive and controlling manner, then the nonpersonal factors may thwart or overwhelm the training and development efforts. As a matter of fact, we have seen many organizations in which developmental efforts have been contravened by unaddressed variables.

For example, a number of organizations have conducted training programs and instituted incentive systems to get people to perform better but have done virtually nothing about (a) the mechanistic nature of worker-level jobs; (b) dysfunctional social norms operating in worker groups; (c) directive and controlling styles of managers and supervisors; (d) mechanistic organizational structures, systems, and practices; and (e) other significant socio-technical influences on personnel's attitudes and performance.

So, again, an organization can do all sorts of great training, but *if most of the factors in the lower left corner are not made more team-oriented, then mechanistic organizations—and even permissive and middle-road organizations—will remain virtually the same and the training time and money will largely be wasted.* Indeed, Fleishman, Harris, and Burt (1955) and many others have observed that the human relations attitudes and skills people learn in courses and seminars will probably not be applied on the job unless the working environment is conducive to and reinforcing of that behavior. Thus, although many organizations' management development personnel would rather not admit it, millions of training dollars go down the drain every year because too many major factors have not been identified and dealt with systemically.

Effective training also requires changing or improving personal factors. According to Elton Mayo (1945, 1992), (a) knowledge changes are the least difficult and time-consuming to obtain; (b) attitude changes are usually more difficult and require more time to obtain; (c) individual behavior changes are even more difficult and time-consuming to obtain; and (d) group behavior changes are the most difficult and time-consuming to obtain. Fred Fiedler (1967), Morris Massey (1976, 1979), and a recent army study all agreed that *values and personality traits do not really change*—especially after age twenty—unless either (a) a person experiences some very traumatic or other highly emotional event in his or her life or (b) a person undergoes intense psychotherapy for one to three years. Even so, that does not mean that organizations cannot influence behavior and to some extent alter it. But it does mean that without deep-seated attitude changes, behavior is much more difficult to change and to change permanently.

Behavior is difficult to change because of two major factors: First, the effects of training are generally short-term. As the president of one of the country's largest seminar providers acknowledged privately, participants in their seminars forget most of what they have learned within thirty days. This is largely because attitudes cannot be adequately reinforced and skills cannot be made habitual in a few hours or days. But it is also due to the second reason: what was learned is not reinforced when participants return to their organizations. Without organizational reinforcement, people behave according to their habits, personal motives, and ingrained attitudes—unless they stop to think about what they are doing and consciously apply what they have learned. But people do not always stop to think about what they are doing and how to do it better. That is why it is so necessary to have everyone in an organization (a) mutually reinforcing each other's developmental efforts; (b) reminding each other to use certain methods, procedures, or practices; (c) developing norms to reinforce preferred attitudes and behavior; (d) and establishing organizational systems, policies, and procedures that foster personnel's ongoing use of what they have learned.

The preceding discussion is borne out by seminar participants who say, "This is all very well and good, but the person who really needs to be here is my boss! He behaves in a non-thought-oriented, authoritarian manner but thinks he's behaving in a high task, high people manner." The trouble is, that superior was probably in the same seminar years earlier, but (a) he forgot most of what he learned and (b) whatever he managed to retain was overridden by other socio-technical phenomena operating in the organization. His superiors and colleagues were probably still being directive and controlling; dysfunctional social norms (which are seldom

identified and dealt with) probably remained the same; and organizational systems and practices were never modified so that they would both enable and reinforce team behavior.

This discussion is sometimes complicated further by the controversy over which to change first—attitudes or behavior. The answer should be “both.” Improved attitudes increase willingness and motivation to change behavior. On the other hand, even slight improvements in behavior bring about more positive feedback, which, in turn, enhances willingness and motivation. In other words, it is not really an either-or situation. Forget the controversy. *Work on attitudes and behavior at the same time, so that the effects of each will both supplement and reinforce the other, producing a “ratchet effect.”*

Thus, if an organization is going to influence all those nonpersonal factors and phenomena so that they become more conducive to a participative atmosphere and team relationships, it must pursue the activities listed in the middle section at the bottom of Figure 12.1. It must enrich mechanistic jobs through job redesign and participative practices. It must develop HT,HP attitudes and behavior patterns among the managerial and supervisory staff (so that each superior and colleague knows what is expected of the others). It must develop more organic (less formal) organizational structures and superior-subordinate working relationships (in which managers guide subordinates’ participation in integrative functions). It must emphasize performing the think-work integrative functions effectively, so as to improve activities involved in goal setting, planning, decision making, organizing, staffing, implementing operational plans, and evaluating performance. It must establish more participative and developmental policies, practices, and procedures. It must identify existing group norms, determine whether they are functional or dysfunctional for organization development and greater teamwork, and then have personnel work together to replace any dysfunctional norms with more appropriate ones. And it must help personnel at all levels to identify and then deal more effectively with forces outside the organization that may be dysfunctionally influencing personnel’s attitudes, behavior, interactions, and performance.

How can an organization accomplish all that effectively and obtain permanent results? The answer, as shown in the bottom right corner of Figure 12.1, is by educating all managers, supervisors, leaders, and their personnel, so that they can all (a) appreciate how they will benefit, (b) understand the concepts and principles behind the new methods or practices, (c) participate in the effort to identify needed changes or improvements, (d) participate in planning what part they will play in implementing development and change processes, and (e) work together to bring about desired improvements in the personal and nonpersonal factors that affect people’s ability to manage themselves and others. In other words, everyone must be enabled to work together to mutually reinforce what they are all trying to accomplish.

Think of it as change management. Getting personnel at all levels to feel, think, and behave differently results in change. People cope with and implement change better when they participate in (a) identifying the need for it, (b) planning it, and (c) implementing it. In effect, *participative management helps make organizational changes people’s own, just as it helps make their jobs their own.*

## REVIEW OF MD/OD PROGRAM PHASES IN TERMS OF THREE MAJOR ILLUSTRATIONS

In Figure 1.1 (page 20), the two basic phases of the organization development program outlined in this book are the preparation phase and the formal training phase. Two diagrams in Part Two also deal with phases and aspects of Figure 1.1, but in slightly different ways. In order to make

the relationships among the illustrations clear, this section briefly reviews and interrelates Figures 1.1, 11.1, and 12.1.

### **The Preparation Phase in the Context of Part Two**

First, as in OD interventions in general, the first phase involves the preparation activities in the left-hand column of Figure 1.1 (page 20), which precedes Module 1 of the education and training program. Two of those activities, (1) orienting personnel to the aims, concepts, activities, and benefits of the program and (2) doing developmental planning, directly correspond to the Phase 1 steps shown in Figure 11.1 (page 262). The third (middle) activity of the preparation phase, researching and analyzing the organization (which includes doing interviews and attitude surveys), involves gathering and analyzing basic information about (a) the organization (structure, resources, systems, and practices); (b) personnel's knowledge and skill requirements and their existing levels of those inputs; and (c) personnel's attitudes about the organization, their jobs, and each other.

### **The Formal Education and Training Phase in the Context of Part Two**

The training sessions in Modules 1–7 in Figure 1.1 directly correspond to aspect B (“formal integrative training”), which is conducted during Phase 2 in Figure 11.1. They also correspond to the upper and lower boxes on the right side of Figure 12.1. The superior-subordinates discussion, OD application, and team-building sessions, which follow each module's training sessions in Figure 1.1, correspond to aspect C (“experiential learning through participation”) of Phase 2 in Figure 11.1. It is during both training and superior-subordinates sessions—but particularly the latter—that participants begin to (1) identify needed personal, unit, and organizational changes or improvements and (2) formulate plans for implementing them. Implementation involves (a) developing themselves and their subordinates and (b) bringing about improvements in the socio-technical factors or phenomena that are exerting major influences on their attitudes, behavior, interactions, and performance.

In other words, the training sessions prepare participants to take part in planning and implementing the activities in the lower middle section of Figure 12.1. As indicated by the arrows, those activities, in turn, bring about changes or improvements in the socio-technical variables in the bottom left box of Figure 12.1. The bottom portions of Modules 1–7 in Figure 1.1 indicate the socio-technical variables that training sessions have prepared participants to analyze and address during the superior-subordinates sessions. It should also be noted that at the end of the last chapter in each module (each part of this book), we have outlined discussion topics and activities that will help participants identify which socio-technical variables might need changing or improving.

## **REVIEW OF BASIC EDUCATIONAL CONSIDERATIONS IN DESIGNING AN INTEGRATED MD/OD PROGRAM**

To review briefly, these were design considerations mentioned in Chapter One:

- Conduct an entire, comprehensive program rather than disjointed ad hoc training that leaves out many important topics and never pulls together the many separate and seemingly unrelated concepts and principles. Management should no longer be taught as a series of hit-and-miss, stand-alone topics.



- Cover a full range of topics—for all of the eight reasons mentioned on pages 25 and 26.
- Sequence areas or topics in a logical building block sequence that (a) prepares people for subsequent topics and (b) later uses and reinforces what they learned earlier.
- Cover areas or topics adequately. Cover the basics, but often go beyond the basics so that students or participants learn more (if not all) of what they need to know to make the concepts, principles, and practices work for them.
- Interrelate and integrate what is being learned—as is demonstrated throughout this book. As will eventually be shown in Chapter Eighteen, all the topics in this book are related, and their interrelationships must be understood in order for anyone to manage most effectively.
- Enable participants to apply concepts, methods, and tools soon after they learn them, so that they experience benefits as they progress from module to module (rather than at some time following the end of a program).
- Schedule regular sessions, in order to keep participants thinking and talking about what is being learned and how it might be used to improve themselves and the organization.

## **TWO SOCIO-TECHNICAL CONSIDERATIONS IN DESIGNING AN INTEGRATED MD/OD PROGRAM**

The next two design considerations stem more from the implications of socio-technical phenomena than from educational principles and training methodology.

### **Use a Synergistic Approach**

Figure 12.1 indicates the most important personal and nonpersonal variables that need to be changed or further developed in order to bring about significant and permanent organizational improvement. The MD/OD project outlined in this book is synergistic for two reasons: First, it is designed to deal with or improve a *comprehensive* group of personal and nonpersonal factors. It does not particularly matter which variables are more important or less important. All of them exert significant influences on managerial, supervisory, and workforce attitudes and behavior. Some of them can even undermine or override efforts to improve the others. Thus, it is advisable to deal with or improve as many as possible. Second, the project is synergistic because it deals with the group of important variables in a *systematic and systemic* manner, so that they can all work together to *mutually reinforce* their HT,HP influences throughout an organization. This increases the chances of any such MD/OD program's success.

### **Systematically Involve Participants from All Managerial and Supervisory Levels and Organizational Units**

Earlier in this chapter, the following was said about Figure 12.1: "Training in the areas listed in the top right box are aimed at developing more functional integrative and interpersonal attitudes and behavior patterns listed in the top left box." However, if the major nonpersonal influences on managerial or supervisory attitudes and behavior shown in the bottom left portion are dysfunctional, are not improved, and continue to exert dysfunctional influences, they will tend to negate the benefits of training. In other words, if all major factors that influence

managerial or supervisory attitudes and behavior are not working together to reinforce more functional attitudes, better developed skills, and more functional behavior, management training dollars will be largely wasted. This, in fact, is what happens in many organizations—especially those that use the traditional ad hoc approach to managerial and team development. Thus, we conclude the following:

First, if major influences on managerial and supervisory attitudes and behavior are to exert functional influences on managers and supervisors and therefore on the entire organization, then (a) jobs should be enriched; (b) all superiors' and colleagues' styles must become more team-oriented; (c) reinforcing organizational structures, policies, and procedures must be established; (d) informal social groups' norms must become more team-oriented; and (e) the influences of outside forces or factors must be dealt with more effectively.

Second, all of these improvements cannot be brought about successfully unless all managers, supervisors, and their personnel develop the knowledge, skills, and attitudes that will enable them to work together to bring them about. As shown in the bottom right portion of Figure 12.1, this requires (1) training all personnel—especially the managerial and supervisory team—so that everyone can work together to (2) perform the actions shown in the bottom middle section of the figure and thereby (3) bring about the development-reinforcing changes to the factors shown in the bottom left corner and then (4) mutually reinforce what all are learning.

In effect, this is the bottom line: *An organization cannot effectively and fully develop any one manager, supervisor, or worker group without also developing the rest of the managerial, supervisory, or leadership team and the organization as a whole.* The team members must all be able to work together in order to successfully bring about change.

The following are more specific reasons for involving the entire managerial, supervisory, or leadership team (and its worker-level employees) in an organization development program:

- It facilitates participants' contracting with their superiors, subordinates, and colleagues to work both individually and together to further develop themselves, each other, and the organization. For example, during the superior-subordinates sessions, they can (a) set goals concerning desired end results, (b) formulate milestones on the way to those goals, and (c) plan who is going to be held responsible for the what, when, with whom, and how of action plans.
- When participants at many levels know what everyone else is being exposed to and is expected to learn or develop, it puts the onus on those at each level to do their best to learn or develop as much and as well as they can. For example, it motivates managers to do better than subordinates, so that they do not appear to be less competent than their subordinates, and it motivates subordinates to do at least as well as their superiors, so that they do not appear to their superiors to be unmotivated or inept.
- It establishes a common frame of reference among participants. It gets them all talking and thinking in terms of the same concepts, principles, vocabulary, methods, and tools. It prevents wider gaps in knowledge and skills from developing between upper managers and middle managers, middle managers and supervisors, and supervisors and their personnel. Such gaps are often rather wide before a training and development program is begun. If they become wider, personnel at different levels of the organization will find it difficult to discuss concepts in the same terms and to apply their developing knowledge and skills together. A common frame of reference enables all levels to work together to bring about more significant and permanent organizational improvements.

- It facilitates superior-subordinates sessions following each training module. Again, the issues and socio-technical influences that can be addressed during these sessions are outlined at the end of the last chapter of each part of this book.
- Organization-wide involvement and involvement of all managerial and supervisory levels also facilitate the following:
  - *Mutual reinforcement of learning that is taking place.* This mutual reinforcement is absolutely necessary if significant and permanent developmental improvements are to result. If superiors do not know what subordinates are learning or developing, they cannot reinforce the learning and development processes. If subordinates do not know what their superiors are learning, they can neither (a) give their superiors useful feedback nor (b) effectively assist their superiors in identifying and bringing about organizational improvements.
  - *Cross-pollination of ideas and suggestions,* which is necessary for effective horizontal integration of specialized functions or departments.
  - *Sensitizing of participants to each others' departmental concerns and problems,* which helps them better understand and resolve interpersonal and interdepartmental conflicts.
  - *Identification and systematic improvement of factors that are affecting participants' motivation, attitudes, skills, interactions, and performance.*

When including different levels of personnel in training and development, keep in mind this cautionary recommendation: Place superiors and their immediate subordinates in different seminar or training groups instead of mixing them together. This enables subordinates to speak their mind, share information, and make suggestions without being intimidated by their superiors' presence. It also precludes superiors from trying to dominate training sessions and push their own agenda.

## CONCLUDING REMARKS

The project illustrated in Figure 1.1 prepares participants to use their increased knowledge, improved attitudes, and more highly developed thinking, learning, and interpersonal skills to perform an extraordinarily effective organizational planning process—whether strategic or annual. They can maximize the effectiveness of that process by applying all the interrelated activities shown in Figure 18.1 (the Unified Practice of Management™ model). In addition, they can formulate and begin to implement plans for bringing about the socio-technical changes shown in Figure 12.1 and the organizational improvements illustrated in Figure I.1 (page 4).

The next section contains recommendations for conducting the superior-subordinates discussion, OD application, and team-building sessions that conclude Module 2. Once that series of sessions has been completed, participants will be ready for Chapter Thirteen on individual problem solving and decision making, which constitutes Part Three (and Module 3). Chapter Thirteen will review the analytic approach and enable participants to begin integrating their knowledge of that methodology with their greater knowledge of individual, organizational, and managerial behavior. Integrating their knowledge in this way will enable them to better identify opportunities to improve the influences of socio-technical phenomena within their organization.

## **RECOMMENDATIONS FOR CONDUCTING THE SUPERIOR-SUBORDINATES DISCUSSION, OD APPLICATION, AND TEAM-BUILDING SESSIONS FOLLOWING THE TRAINING PORTION OF MODULE 2**

### **General Information**

As shown in the lower Module 2 box in Figure 1.1, once all participants involved in the program have completed the education and skill development sessions in the training portion of Module 2 (Chapters Eight through Twelve), the top executive should meet with his or her immediate subordinates to discuss what has been learned and how to use it. Following the initial top-level meeting, the second-level managers meet with their own immediate subordinates to (a) discuss both top management's ideas and their own ideas, and (b) determine what each of the major units should do. This occurs in linking pin fashion down the organization to the lowest level involved in the program.

### **Objectives**

These discussions (a) enable participants to crystallize and reinforce what they have learned by immediately using it; (b) enable them to bring about some improvements right away by immediately applying what they have learned (rather than waiting until the end of the program to experience any positive results); (c) help improve superior-subordinate relationships; and (d) enable managers' subordinates to participate in deciding what needs doing, how it should be done, by whom, and when.

As shown at the very bottom of the lower Module 2 box in Figure 1.1, these linking pin sessions are aimed at identifying and dealing with task-related (technological) and organizational socio-technical factors such as those listed in Table 3.1 on page 52. These factors can include (a) participative practices (or the absence of them); (b) opportunities to enrich jobs (especially at worker levels); and (c) how to further develop team-oriented attitudes and working relationships throughout the organization.

### **Preparation**

If participants have used the session preparation guides provided on the CD-ROM for each chapter in Part Two, they will have already thought about the issues that follow and will be better prepared to discuss them.

Sessions should be scheduled for at least four hours, including breaks. Participants may choose to continue their discussions during subsequently scheduled sessions.

### **Socio-Technical Areas for Factor Analysis**

During class and seminar discussions, participants usually identify or suggest problem areas that could be discussed during these sessions. Thus, discussing the problems on people's minds is a common approach. If they rely solely on this approach, however, managers and their subordinates may (a) fail to identify the real, underlying causes of problems; (b) fail to notice unidentified problems; and (c) miss opportunities to improve many aspects of operations that could be fine-tuned or otherwise improved. If participants and consultants choose to take an approach that involves solving the problems that immediately come to mind, they should also deal with the issues listed in the next section, "Topics for Problem-Solving Discussions."

The following approach, however, is recommended here. It is a more organized and orderly (yet positive) factor analysis approach. Because this module has discussed how numerous task factors, organizational variables, and personal influences (such as those listed in Table 3.1) can influence managers', leaders', and personnel's motivation, attitudes, and behavior, participants are prepared to perform more sophisticated analyses.

1. In preparation for the superior-subordinates sessions, assign different sets of factors to individuals or groups for preliminary analysis. This will save time during discussion sessions.
2. During the sessions, use participants' prepared inputs to help analyze what is going on and why. Look at each category of factors or each finite factor in turn, and do the following:
  - a. After writing the factor on some surface that is large enough to accommodate an in-depth analysis of many factors, answer the question "What is our situation with regard to this factor or category of variables?" Write next to it the facts or other information associated with that factor. For example, analyze task variables by noting just how mechanistic low-level jobs actually are and the particular special abilities (or other inputs) required by those jobs. With respect to managerial behavior and practices, write down the various *types* of behaviors or practices and then write next to them the behavior, practices, or styles that are actually being observed.  
As factors and associated facts are added to the analytic diagram, use lines and arrows to indicate cause-effect or sequential relationships among factors (for example, jobs, practices, behaviors, units, groups, or organizational levels). The diagram should show how numerous nonpersonal (task-related and organizational) variables and some personal factors are influencing the motivation, attitudes, behavior, and performance of managers, their immediate subordinates, and their worker personnel. It should also show how these phenomena are all influencing each other.
  - b. Through discussion, ascertain whether each distinct factor-related situation (as described by the facts or other information) is *functional or dysfunctional* for motivation, attitudes, behavior, or performance affecting the unit or organization. If the situation is considered functional and cannot really be improved, then go on to the next factor.
  - c. If the situation is considered dysfunctional or improvable, formulate either (a) solutions (and implementation plans) for dealing with it or (b) plans for improving the factors involved.

This process generally gets participants thinking about all of the topics mentioned in the next section.

### Topics for Problem-Solving Discussions

If a group does not take the factor analysis approach just described, which focuses more on identifying opportunities to improve many factors and their influences than on solving particular problems (which happens anyway), consider using the following topics (in the indicated order) to help crystallize and solve additional problems.

1. Identify the managerial styles being used throughout the organization (if generalizations can be made), and determine how attitudes, behavior, interactions, and performance within the unit or organization are being positively or negatively affected by them.

2. Identify the managerial and supervisory attitudes, behavior, and practices that need changing or improving. To help do so, use the Checklist of HT,HP (High Task, High People) Attitudes and Behavior Patterns on the CD-ROM (found with the Chapter Eight content).
3. Identify any major nonpersonal socio-technical factors that are adversely affecting managerial and supervisory attitudes and behavior and are in need of correction or improvement.
  - Identify the natures of personnel's tasks at different organizational levels and in different units. What might their impact be on (a) workers' attitudes and behavior and (b) managers' and supervisors' attitudes and behavior?
  - Determine how organizational factors such as structures, systems, and policies are affecting attitudes and behavior. What changes or improvements in these areas might facilitate or reinforce desired improvements in workers', managers', and supervisors' attitudes and behavior?
  - Also consider to what extent problems in the preceding areas are being caused by ineffective performance of management functions.
4. Begin to review organizational, unit, and team development goals, strategies and tactics, and programs and projects in light of the preceding discussions. Begin to determine what should be changed or improved and how to go about doing so.

Regardless of which approach is used to identify problems, for each of the preceding areas discussed, identify (a) what to do now or in the short term and (b) what might be analyzed better or done better once topics in subsequent course modules have been covered. For example, until topics such as interpersonal relations, communication, and problem solving have been covered more fully, it would be best to postpone discussions of the following topics: conflicts within and between units; poor communication between individuals, units, and organizational levels; and faulty flows of materials, services, or information between units. The activities in all of the end-of-module sessions should contribute to any in-depth planning and problem-solving processes conducted during the OD project associated with this training program.

### **Commitments to Actions and Results**

In formulating goals and plans, superiors and their immediate subordinates should contract with each other on the following specifics: (a) who is going to be held responsible for which final outcomes; (b) milestones on the way to the end results; and (c) who will do what, when, with whom, and over what period of time.

Participants should apply the principles, practices, and visual tools discussed in Chapters Two through Five. They should also take into consideration other anticipated changes and their priorities and costs.

### **Facilitation**

These discussions should be facilitated by an OD consultant, a professional outside facilitator, or a well-trained internal facilitator—at least until the end of Module 5, by which point managers may have developed adequate team think-work facilitation skills.

To guide these sessions, the facilitator or consultant may use Table 16.1 (also on the CD-ROM), which outlines leader and participant responsibilities involved in preparing for and conducting

team think-work processes. However, because a number of topics in that table have not yet been covered, at this point, we suggest handing out copies of Table 13.1 (also on the CD-ROM) and briefly walking participants through its problem-solving steps.

In addition to guiding the mechanics of a group's think-work process, the facilitator should use his or her knowledge and experience to lead participants toward identification of (a) real, underlying causes of problems; (b) other influential (or possibly causal) factors, whose impacts are not always obvious; and (c) solutions or plans that have been or would tend to be most successful.

### **Evaluation and Follow-Up**

At the end of each of this module's discussion sessions, the facilitator may ask participants to critique the process by filling out or at least discussing the items on the Group Process Evaluation Form (found with the Chapter Sixteen content on the CD-ROM).

After all Module 2 superior-subordinates sessions have been conducted, monitor planned activities and participants' adherence to the commitments they made during the sessions. Managers and their subordinates—perhaps guided by the OD project consultant or an appointed high-level manager—should evaluate results upon arrival at each planned milestone.

