



Learning Lunch # 18

Alignment, Adaptation and Engagement

Host = Dennis Sergent, Sergent Results Group
517-381-5330

April 5th, 2010
10:30 AM to 1:00 PM

University Club of Michigan State
3435 Forest Road, Lansing, MI 48909
517-353-5111

Learning Lunch - Agenda

February 20th, 2009 It Started

- Learning Lunches 1-4 - *Networking & Forming Teams*
- Learning Lunches 5 - 9 - *Enterprise Thinking*
- Lunches 10 - 12 - *More Thinking Tools*
- Lunches 12 - 15 - *Branding*
- Lunch 16 - *Understanding & Acting On The Voice of The Customer*
- Lunch # 17 - *Change Models*

April 5th, We Will Discuss

- Lunch # 18 - *Alignment, Adaptation and Engagement*

Future Discussions

- Lunch # 19 - April 30th, 2010 - Friday = *Promoting Actions and Cause Networks*
- Lunch # 20 - May 18th, 2010 - Tuesday = *Testing & Evaluation Ideas (Doug)*
- Lunch # 21 - June 10th, 2010 - Thursday *Project Management (Program Management, PDSA - Joel)*

Other Subjects

- **Quality Management System Comparisons**
- **Skilled Incompetence / Managerial Malpractice - Overcoming Organizational Defenses**
- **Having Difficult Conversations - Principles and Tools**
- **Enabling Transformation - Principles and Planning**
- **Culture**
- **Leadership**
- **Influence (Influencing Your Leader and Your Team)**
- **Innovation**
- **Your Ideas?**

What Can We Think About Differently?

- **Thinking Together**
 - As Well As Alone
- **Rethinking What Our Words Mean?**
 - Thinking?
 - Working?
 - Learning?
 - Management?
 - Leadership?
 - Ethics?
 - Investment?
 - Interchangeability?
 - Quality?
 - Continuous?
 - Together?
 - Technology?
 - Rethinking?

Systems Thinking Tools & Models

- 
- **ADDIE Model**
 - **Advocacy Model (Ladder of Inference)**
 - **Alignment - Adaptation Model**
 - **Anticipatory Thinking**
 - **Appreciative Inquiry**
 - **BEM - Behavior Engineering Model**
 - **Branding**
 - **Case Design & Documentation Concept Triangle**
 - **Cause & Effect Analysis**
 - **Cause Network**
 - **Change Models**
 - **Complexity (Structural vs. Interactive)**
 - **Continuous Performance Improvement (Kaizen)**
 - **Current Reality Trees Creative Hit List**
 - **DATT - Directed Attention**
 - **Dale Brethower System Model**
 - **David Langford "Tool Grid"**
 - **DIVE - Define, Investigate, Verify, Ensure Emotion and Logic**
 - **DMAIC - Six Sigma Tool**
 - **Five Elements / Five Organizing Principles**
 - **Five Qs (Five Key Questions For Performers - Maritz Inc.)**
 - **Geary Rummler Model**
 - **Groupthink**
 - **High Impact Learning**
 - **Histogram Test**
 - **Hoshin - Kanri Planning**
 - **Idealized Design**
 - **Investment Thinking**
 - **Kaizen - Continuous Improvement**
 - **KANO Model**
 - **Kepner Tregoe Performance System**
 - **Key Trouble Shooting Analysis**
 - **Ladder of Inference**
 - **Lateral vs. Linear Models**
 - **Lean and Lean Six Sigma**
 - **Learning Cycle**
 - **Left Hand Column Tool**
 - **Life Cycle Management**
 - **MORT - Management Oversight Risk Tree**
 - **Overcoming Organizational Defenses (Skilled Incompetence)**
 - **Parallel Thinking**
 - **PDSA - Learning Cycle**
 - **Performance Feedback Tool (PFT)**
 - **Personal Mission Statement**
 - **Productive Reasoning (vs. Defensive Reasoning)**
 - **Program & Project Management**
 - **Promoting Actions (Cause Networks)**
 - **Random Word**
 - **Robust Engineering**
 - **RSVP Standards (ISPI)**
 - **Run To Failure**
 - **SAVI - Learning Model**
 - **Seven Habits**
 - **Situation Analysis**
 - **The Six Boxes**
 - **Six Action Shoes**
 - **Six Sigma Tools (DMAIC)**
 - **Six Thinking Hats**
 - **Systematic Problem Solving & Decision Making**
 - **Taguchi Loss Function**
 - **Tool Time Book**
 - **TRIZ Functional Diagram**
 - **Vision, Mission, Values**
 - **Voice Of the Customer (VOC)**

Alignment & Adaptation

- The Lead Team will set initial focus for the efforts most critical to success of the enterprise; common purpose, common principles, alignment of communication around the purpose and alignment of understanding by the team.

- They will also revisit the purpose, principles, communications and understanding by feedback from the process coming back into the vision, mission, values and dialogue from the aligning conversations and dialogue with stakeholder subteams.

COMMON PURPOSE

(Vision & Mission)

COMMON PRINCIPLES

(Guiding Values)

Brand, Culture, Performance

COMMUNICATION

(Dialogue)

Results - Opportunities & Issues

Processes - Products - Services

UNDERSTANDING

(Alignment)

People - Plans - Action Items

Joint Marketing Agreements

Operating Agreements

Subcontracting Agreements

Alignment, Adaptation & Engagement

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COMMON PRINCIPLES
(Guiding Values)
Brand, Culture, Performance

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(Alignment)
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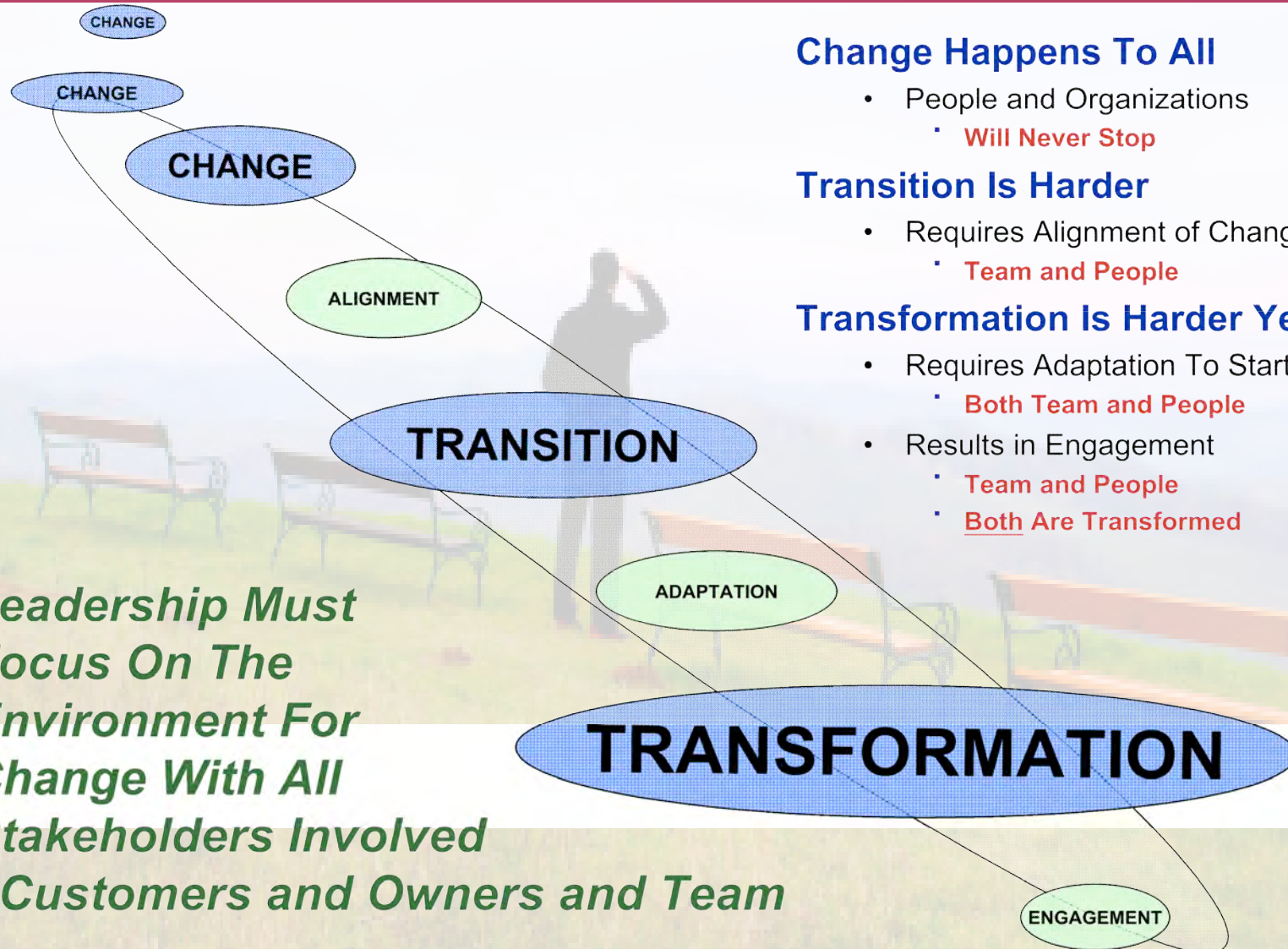
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•Engagement

•By involving formal and informal leaders (early adopters and innovators) from each stakeholder group, the Lead Team will set up subteams to engage everyone in the organization it seeks to change or involve in the transition and transformation.

•Further, Transition Management Teams will be set up to *involve everyone* in gathering feedback and getting that feedback to the Lead Team.

Change Model



Change Happens To All

- People and Organizations
 - **Will Never Stop**

Transition Is Harder

- Requires Alignment of Changes +
 - **Team and People**

Transformation Is Harder Yet

- Requires Adaptation To Start
 - **Both Team and People**
- Results in Engagement
 - **Team and People**
 - **Both Are Transformed**

Leadership Must Focus On The Environment For Change With All Stakeholders Involved - Customers and Owners and Team

Purpose Focused Dialogue

A method to discuss knowledge and create solutions around questions which matter to teams.

BASIC ELEMENTS - How it Works

SEAT AT ROUND TABLES of 4 - 8

With Large Paper Sheets, Markers,

EXPLORE QUESTIONS, ISSUES, IDEAS

*Discuss What Matters To Their Situation in
15 - 20 Minutes*

WRITE / DRAW KEY IDEAS & CONNECTIONS

Record & Share Major Insights

TRAVEL IN SEVERAL ROUNDS

*Carry Questions, Ideas, Insights To
New Rounds*

TABLE HOST REMAINS

*Briefly Shares Previous Questions,
Ideas, Insights
Travelers Connect Ideas From
Previous Tables*

LISTEN FOR CORE QUESTIONS, INSIGHT & PATTERNS

*Blend Perspectives In
Progressive Rounds*

BASIC PRINCIPLES - How to Work It!

CLARIFY PRINCIPLES & CONTEXT

*Define Purpose, Participants,
Time Limits, Possibilities*

CREATE COMFORTABLE SPACE

*Pay Attention To Invitation,
Refreshments, Music, Lighting*

EXPLORE SIMPLE, CLEAR, POWERFUL ISSUES

*Ask Open Ended Questions
Which Matter To Participants*

ENCOURAGE PARTICIPATION

*Share Your Best Thinking,
Listen Attentively, Make A Difference*

DIVERSIFY PERSPECTIVES

*Link Discoveries In a Widening
Dialogue and Conversation
Build on Other's Thinking*

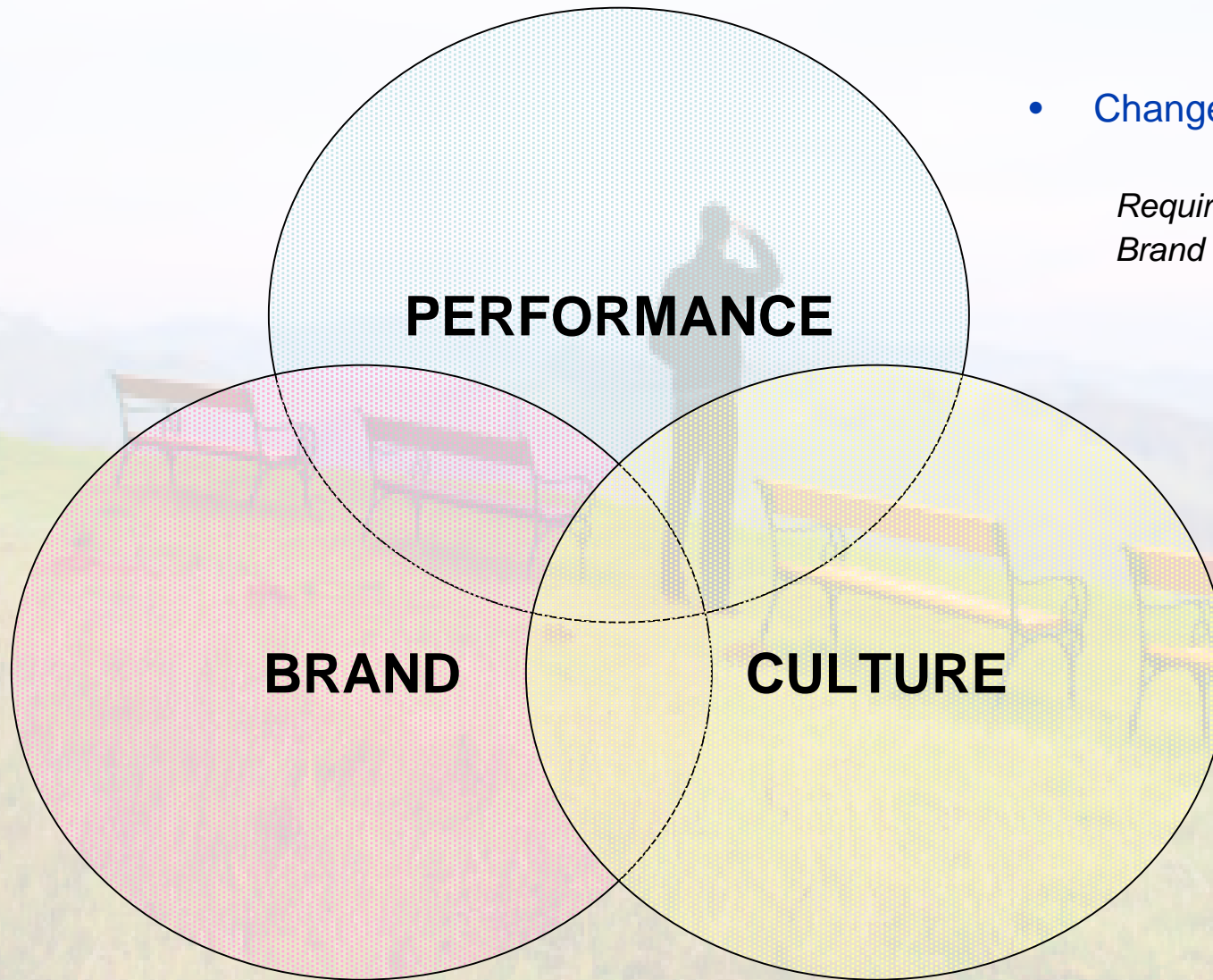
LISTEN TOGETHER

*Find Deeper Wisdom
As A Team*

SHARE QUESTIONS, INSIGHTS, PATTERNS IN TOWN HALL CONVERSATION

Larger System Becomes Evident, New Actions Become Possible, Team Value Becomes Obvious

Managing Change

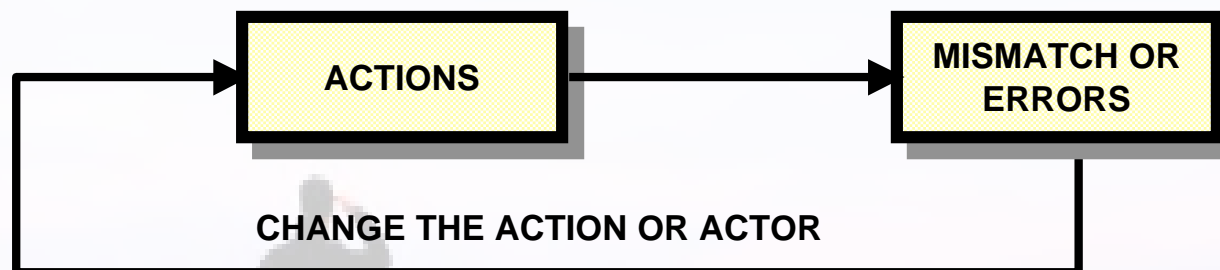


- Changes To Performance

*Require Changes To Both
Brand and Culture*

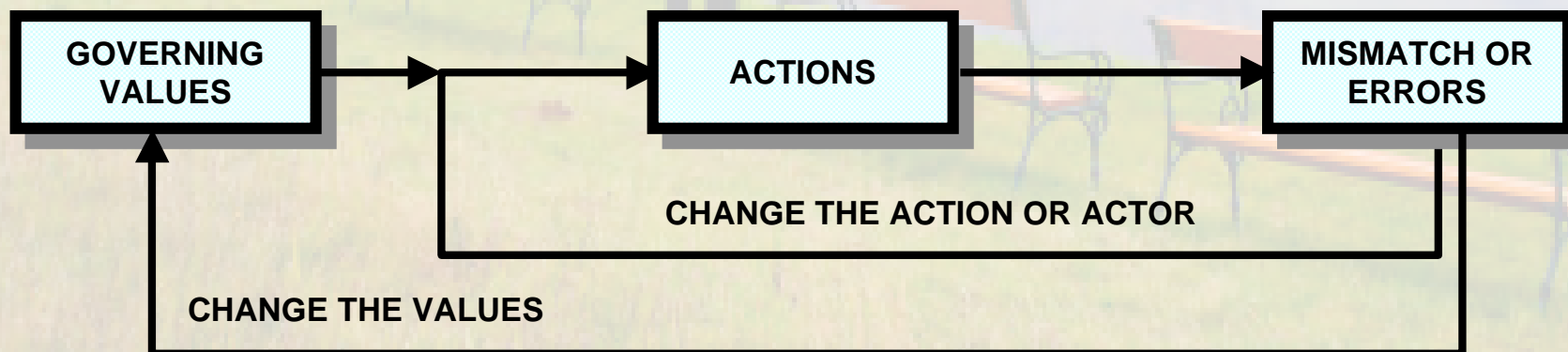
Single Loop Learning - Double Loop Learning

SINGLE-LOOP LEARNING



Invalid or Incomplete Information - Ineffective Roles & Policies, Designed Errors = *Fix Blame*

DOUBLE-LOOP LEARNING



Valid Information - Informed Choices - Monitored Implementation = *Fix System*

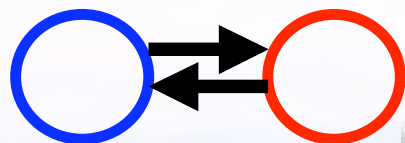
Elements of Personal Effectiveness

- **DECIDE**
 - Be clear, specific and positive about what you want.
- **BE HONEST**
 - Tell the truth, first to yourself and then to others.
- **EXPRESS YOURSELF**
 - Know your unique contribution and make it.
- **TAKE RISKS**
 - Break through your limitations and operate without guarantees.
- **PARTICIPATE 100%**
 - Be totally involved.
- **BE RESPONSIBLE**
 - Take ownership for results and be able to respond through choices.
- **CREATE PARTNERSHIP**
 - Work in a context of mutual benefit.
- **COMMIT**
 - Do what it takes.

Relationships - The Power In Any Team

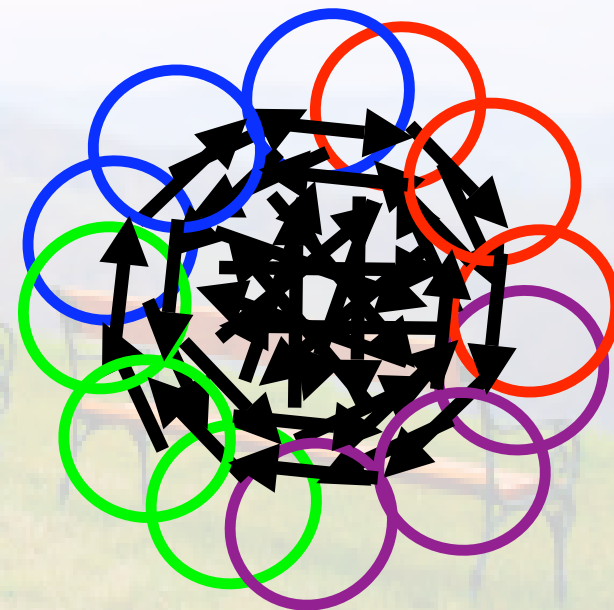
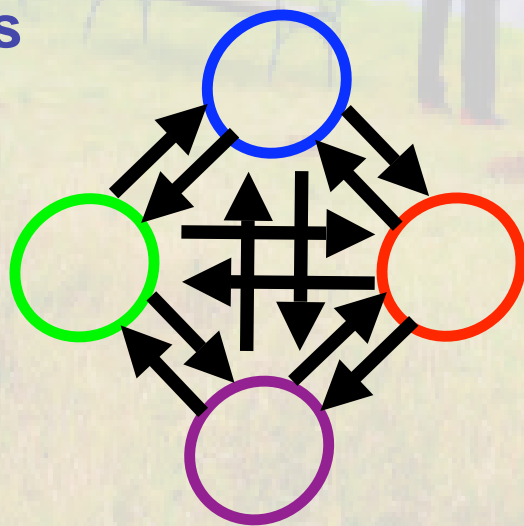
- The **Power** of a Team is the sum of the **Trusting Relationships** between its members

**2 people = 2
relationships**



12 people = 132 relationships

**8 people = 56
relationships**



Debate vs. Dialogue Models

DEBATE MODEL
Information Processing Context

OLD FRAMEWORK

1. Argument
2. Logic - Affirmative / Negative
3. Evidence
4. Impact

HOW LEARNING IS DIFFERENT

- Banking Model* of Learning
- Reading At Speed to Memorize
- Repeating Back At Rote, Incomprehensible Speeds
- Quote Expert Ideas & Authors
- Overwhelm "Opponents" with Preponderance of Evidence
- Contradict Opponents
- Win / Lose Proposition

DIALOGUE MODEL
Active Learning Context

NEW FRAMEWORK

1. Identity
2. Purpose
3. Method
4. Adaptation

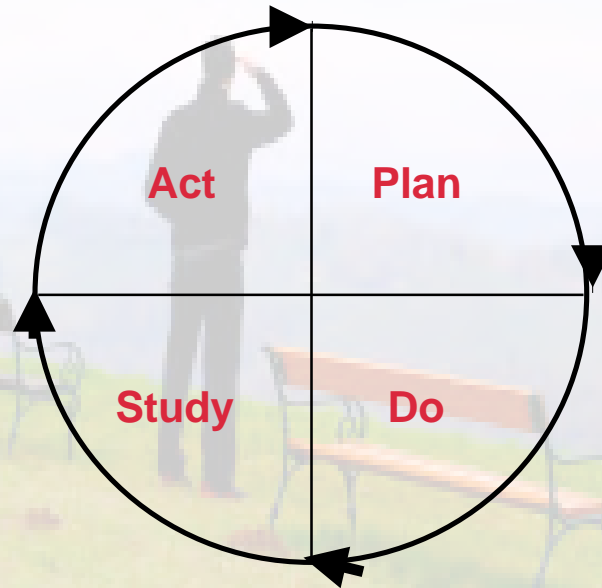
HOW LEARNING IS DIFFERENT

- Pursue Active Learning
- Challenge Thinking in Ideas
- Pose Questions In Dialogue
- Define Adaptation We Must Make
- Win / Win Proposition

* Banking Method as described by Paolo Friere in his writings.

Deming's P-D-S-A Cycle

- We **PLAN** what we want to accomplish over a period of time and what we will do to get there.
- We **DO** something that furthers the strategies and goals developed in our plan.



We **STUDY (Check)** the results of our actions to make sure we achieve what we plan.

We **ACT** by developing procedures to ensure our plans continue to be successful and by changing what is needed to achieve the initial goals.

NEXT ACTION STEPS

- **WHAT ARE OUR NEXT ACTION STEPS?**
 - **What Did I Learn Here?**
 - **What Do We Need To Discuss Next?**
 - **Who Else Should Be Here?**
 - **What Will We Do With This Learning?**
- **WHEN DO WE MEET AGAIN?**
 - **About Every Three Weeks**
 - **Not Every Friday, Monday, etc**
 - **New Proposed Dates**
 - **See Easel At Learning Lunch!**

References

- ***Accelerated Learning Handbook*** - David Meier
- ***The Brand Called You*** - Peter Montoya with Tim Vandehey
- ***Enterprise Thinking*** - Dr. Bill Bellows
- ***The Fifth Discipline*** - Peter Senge
- ***Improving Performance*** - Geary A. Rummler & Alan P. Brache
- ***To Infinity and Beyond*** - Dr. Bill Bellows
- ***Flawed Advice and The Management Trap*** - Chris Argyris
- ***The New Economics*** - W. Edwards Deming
- ***Lean Thinking*** - James P. Womack and Daniel T. Jones
- ***Overcoming Organizational Defenses*** - Chris Argyris
- ***Parallel Thinking*** - Dr. Edward DeBono
- ***Quality & Performance Excellence*** - James R. Evans
- ***Real Progress Requires a Real Transformation*** - The Toughest Gig a Leadership Team Can Undertake - Barry Bebb, Ph.D., MBB
- ***The Six Thinking Hats*** - Dr. Edward DeBono
- ***Teaching Smart People How To Learn*** - Chris Argyris
- ***Thinking Tools & Techniques*** - Tim Higgins

Or

Write Dennis Sergent dsergent@SergentResultsGroup.com

Other Links & Resources

- **Capital Quality Initiative - Lansing, Michigan, Regional, National and International**
 - LinkedIn Group
- **Deming Institute**
 - LinkedIn Group
- **InThinking Network**
 - Ongoing Discussions, Learning & Annual Forum
 - Numerous Resources on Web
 - LinkedIn Group
- **Ongoing Learning, Discussions, Networking and Integration of Ideas**
 - Learning Lunch
 - Maslow's Hierarchy of Needs
 - ORID - Focused Group Conversations
 - Objective, Reflective, Interpretive and Decisional
 - Red Pen - Blue Pen Exercise
 - RedPenBluePen.org and .com
 - Scanlon Leader Network
 - Sergent Results Group
 - Useful Tools on Website
 - The Center For Michigan

The background of the slide is a photograph of a person standing on a grassy hill, looking out over a misty landscape. Several wooden benches are scattered across the hillside. The overall scene is serene and contemplative.

LEARNING LUNCH #18

***Alignment, Adaptation &
Engagement***