NEW TWISTS on Everyday Practices

New Thoughts on the Future of Quality
New Requirements for Leader Selection
New Approaches for Building Relationships
ASQ brings you the three C’s of quality standards!

With revisions to ISO 9001:2015 coming in the fall, ASQ is here to help provide you with the resources, training, and books you need to get certified. ASQ is your one-stop shop for all things standards.

1. **STANDARDS CONNECTION**
   - Monthly e-newsletter highlighting the latest standards news and information.
   - asq.org/standardsconnection

2. **STANDARDS CHANNEL**
   - Get the answers to your standards questions and watch exclusive interviews with top experts.
   - videos.asq.org/asq-standards-channel

3. **STANDARDS CENTRAL**
   - Learn the standards basics, access valuable resources, and get involved in standards creation.
   - asq.org/standards

**BONUS C! NEW ASQ CONFERENCE**

2015 INTERNATIONAL CONFERENCE ON QUALITY STANDARDS

November 9 – 10, 2015 | Indianapolis, IN

Attend the newest ASQ conference and learn how standards can help enhance customer experience and improve business outcomes. Even get guidance to ensure your organization is ready to certify to the latest revised standards.

Visit asq.org/qp-icqs to learn more!
table of contents

4  A New Look at the Future of Quality
Janet Jacobsen

9  A Whole-Person Analysis Is Critical to Finding the Right Talent
Stu Crandell

14 Have You Made the Connecting 2.0 Shift?
Nancy D. O’Reilly

17 In My View … Pied Quality
Kurt Stuke

21 Design Thinking and PDSA
Barbara A. Cleary

24 Opening the Flood Gates of Curiosity
Mary Grace Neville

28 Case Study: The Collaborative Discipline of Daily Quality Compliance Management
Romain Denis

34 Knowledge Management Is Fun
Arun Hariharan

• Behind the Scenes
Delve more deeply into this issue’s featured online options.
• Bonus Article: “The Course of Change Over Time, 2011 Future of Quality,” by Deborah Hopen
• Bonus Article: “Creating Practicality From Dialogue Theory,” by Mary Grace Neville
departments

Editor’s Notebook 3

Doing the Twist

Creating a Shift 12

Putting the Energy Bar Into Practice
Rick Maurer

Lessons From Academia 32

Social Responsibility and Quality Leadership Practices
Holly A. Duckworth

Final Thoughts 39

Thinking About ASQ
Patricia C. La Londe

ONLY @ www.asq.org/pub/jqp

• Educator’s World
  Using Tools to Support Design Thinking in the Classroom
  Barbara A. Cleary

• Did You Know?
  Useful tips and resources for living in a more socially responsible way

• Book Briefs
  Keep track of the latest books related to the people side of quality and improvement

The Journal for Quality and Participation is peer-reviewed and published by ASQ. It focuses on the people side of quality, particularly employee involvement, facilitation, and teams; human resource management; leadership theories and practices; and change management, as well as articles related to the education market and social responsibility.

Publication of any article or advertisement should not be deemed as an endorsement by ASQ or The Journal for Quality and Participation.

The Journal for Quality and Participation—ISSN 1040-9602 is published four times per year (January, April, July, and October) by ASQ, 600 N. Plankinton Ave., Milwaukee, WI 53203 USA. Copyright ©2015 American Society for Quality. Periodicals postage paid at Milwaukee, WI, and additional mailing sites.

Postmaster: Send address changes to The Journal for Quality and Participation, 600 N. Plankinton Ave., Milwaukee, WI 53203 USA. All rights reserved.


For reprint information or permission to quote from the contents of The Journal for Quality and Participation, contact ASQ Customer Care at +1-800-248-1946.

Letters to the editor are welcome. Email them to dehhopen@nvventure.com. Please include your address, daytime telephone number, and email address. ASQ reserves the right to edit letters for space and clarity.
Editor’s Notebook
Doing the Twist

As we were working on this issue of The Journal for Quality and Participation, I had some thoughts about continuous improvement and breakthrough, the two basic approaches for transforming processes that are underperforming to ones that simultaneously meet customers’ and organizational expectations. These are the “bread and butter” activities of quality professionals, and we are all aware of their importance and the steps that are followed to bring them to life in the workplace.

Whether our organizations follow the plan-do-check-act, Lean Six Sigma, or one of the myriad other methodologies that are available doesn’t matter. What those approaches have in common is what’s critical. They all adhere to the fundamentals of the scientific method, which follows these steps: ask a question. Do background research, construct a hypothesis, test the hypothesis by doing an experiment, analyze the data and draw a conclusion, and communicate the results.

Most of us first learned about the scientific method in junior high and revisited it in every subsequent science class as we pursued higher education. You might wonder then why we have so much trouble applying its logic to the workplace and why we need so many variants of it to help us improve processes and their results. I believe this situation is predicated on our need to reshape things to fit our personal perspectives, experiences, and situations. We take new concepts, and we make them our own by rephrasing them or giving them a twist to fit our style. This process of alteration helps us become more comfortable with change and transition to new practices.

That’s the bottom line of improvement, isn’t it? At the end of every improvement project, change must occur. The old process is set aside in favor of a new one—sometimes a small change and other times a substantial one. Regardless of the degree of the change, however, we are required to step out of our comfort zones and walk forward into a new way of life. That can be disconcerting, but it also can be energizing.

Many of the articles in this issue describe twists on the regular practices used by organizations today or on the principles that have been accepted as the foundations we have for doing business. They take what we currently have and propose a twist that will lead us to better performance. They encourage us to face change with an eager spirit that is willing to adopt the learnings of others who have completed the research associated by following the scientific method or one of its variants. At the same time, we still always have the opportunity to take these new ideas and twist them a bit farther to better suit us.

Does facing change make you feel like doing “The Twist” or does it leave you with a sense of “Blowing in the Wind?” The key to success is for us to “turn and face the strain” by embracing change and finding a way to make new concepts and practices part of our everyday lives.

References

Deborah Hopen, Editor
dehopen@nventure.com
ASQ continues its tradition of looking ahead to identify impacts that may affect the future of the profession, organizations, and Society but introduces a new process that was used to gather and summarize the data.

A New Look at the Future of Quality

Janet Jacobsen

ASQ has conducted seven Future of Quality Studies beginning in 1996 and continuing in 1999, 2002, 2005, 2008, 2011, and 2015. The first six studies focused on identifying the key forces that are most likely to shape the future of quality and developing alternative scenarios describing how these forces might unfold. Finally, the previous studies discussed implications of the scenarios for organizations, the
quality field, and for quality professionals. A summary of those studies is presented in the online supplement to this article.

The 2015 Future of Quality Study offers a new twist with 12 essays from experts in various fields from across the world. ASQ CEO William Troy explains, “I wanted you to hear these experts in their own voices, talking about the things they have studied, known, and in many cases, loved. To get them to share their thoughts, we simply asked them, ‘Tell us about the future of the world you know best.’”

Troy noted a few prominent threads that are woven into many of the essays in this year’s study.

• “There is an endless but essential requirement to knock down silos of information in order to get the right information to the right places. I saw in many essays the need for high-quality information to be broadly shared to allow timely decisions. There will be a high price attached to information that is ‘owned,’ sequestered, or compartmented. Where speed of decision and speed of action is crucial, very careful decisions will have to be made about what to share and what to hold close.

• “We must begin to truly think differently about things we assume we already know quite well. Take customers, for example—we think we understand them well already, but we don’t. I think several of our essays would suggest that we are at the dawn of a new era of customer understanding and even with a new understanding, we will barely be able to keep pace with changes in the nature of customer demand, and it is a field that is changing perhaps faster than any of us realize.

• “The implications of almost limitless connectivity will change how we think about, and do, almost everything. We’ve all heard the saying ‘Everything affects everything else.’ This is not really true today, but it will be tomorrow. From the connectivity that is an essential part of smart manufacturing, to medical schools holding classes for thousands of students simultaneously around the world, to city management, where a crisis in one sector can be immediately identified, communicated, and reacted to in seconds, everything will affect everything else, both for better and for worse.”

Perspectives of the Invited Experts

The 12 essays included in the current study are listed below:

• “The Future of Leadership: From Efficiency to Adaptability,” by Stanley McChrystal and Rodney Evans. McChrystal, co-founder of the McChrystal Group, is a retired four-star general, and former commander of U.S. and International Security Assistance Forces, Afghanistan. Evans is the chief innovation officer of McChrystal Group, where she leads the firm’s research and development team.


• “The Future of Manufacturing: Bridging Seams and Transactions to Integrate Next-Generation Information Technology,” by Jim Davis. He is UCLA’s vice provost, information technology, and chief academic technology officer.

• “The Future of Cities: Quality, Planning, and Excellence in Public Sector Management,” by Izabel Christina Cotta Matte. She is an architect and urban planner.

• “The Future of Healthcare: Toward a Global Medical University,” by Devi Shetty. Shetty, a renowned cardiac surgeon and philanthropist, is chair and founder of Narayan Health in India.


• “The Future of Energy: Long-Term Trends and Global Implications,” by Zheng Mingguang. Mingguang is the president of Shanghai Nuclear Engineering Research and Design Institute and an adjunct professor and doctoral supervisor at Shanghai Jiaotong University.
• “The Future of Customer Experience (CEx): CEx Becomes the Dominant Design Force Influencing Markets,” by Gregory Watson and Andrew Watson. Gregory Watson is past president and ASQ Fellow while Andrew Watson is an educator and a STEAM education policy advisor.
• “The Future of Quality: Getting Better All the Time,” by Ronald Snee and Roger Hoerl. An ASQ Fellow and former DuPont employee, Snee is founder and president of Snee Associates, LLC. Hoerl, former head of the Applied Statistics Lab at GE Global Research, is now the Brate-Peschel assistant professor of statistics at Union College.
• “The Future of Quality: Toward Quality for Sales in Addition to Quality for Cost Through Enhancement of Customer Satisfaction,” by Noriaki Kano. A leading expert in the field of quality management, Kano developed a customer satisfaction model that bears his name. He is a professor emeritus at the Tokyo University of Science.
• “Conclusion: Quality for the Future,” by Cecilia Kimberlin. She currently serves as the chair of ASQ.

Here is a brief sample of this year’s study with summaries of three essays.

The Future of Leadership: From Efficiency to Adaptability

Stanley McChrystal and Rodney Evans present a case for a type of quality leadership that will drive success for teams in the future. McChrystal and his colleague share their thoughts on today’s workplace reality where static targets rarely exist. Instead, leaders are faced with uncertainty in all facets of business. In the past, quality was about efficiency, but now adaptability is perhaps even more integral to success.

The authors believe that firms in all sectors need to change their decision-making processes so that those leaders who are nearest to an issue and have the greatest understanding of it are empowered to act. This must happen in concert with creating communication channels so that decision makers throughout the organizational structure have the same situational context and awareness of those at more senior levels. In this sense, the big picture is made available to a larger group of leaders. The envisioned end result is leaders who can make fewer decisions, create ownership and accountability at more levels of the organization, and then have more time available for understanding the environment and proactively addressing new information. This strategy, however, requires a shift from pyramid-style to network leadership.

If an organization is to successfully move from efficiency to adaptability, its leaders must have certain fundamental skills because true adaptability comes from mastering a general leadership skill set. If a leader pours all of his or her energy into decision making or communication, for example, then this leader has little time to anticipate the unexpected. Only when a leader has a mastery of timeless leadership basics can he or she become truly adaptable.

The Future of Customer Experience (CEx): CEx Becomes the Dominant Design Force Influencing Markets

Gregory Watson and Andrew Watson look at the history of customers and design as well as the way forward for organizations that wish to remain at the cutting edge of product development and market success. In the past 50 years, two transformations have altered how products and services are developed. The first is a transition in the way customers are engaged in the design process and the second relates to changes inherent in the design process itself.

The evolution in the design process has shifted from the craftsman model to the engineering model to the marketing model. Now, a fourth model, the customer-driven model, is emerging where customers select from a menu of design functions and features. This new model now requires organizations to think carefully about the best way to select which functions and features to make available to customers. Unfortunately, customers don’t always know exactly what they need in a product or service, and different customers perceive their needs based upon their unique psychological circumstances. The goal ultimately becomes to understand the relationship between design excellence and customers’ perceptions of satisfaction.

The authors contend that increasing knowledge regarding customer points of view, which is necessary for design excellence, will stimulate the design of individualized technology resulting in mass customization. The key will be designing individualized technology that truly adds value to the customer experience, and that will be possible
through empathic understanding of the customer experience. Of course, establishing empathy with customers requires moving beyond a surface-level focus on the customer experience. Successful organizations of the future will need to mindfully design products and services by integrating customer empathy and artistic thinking.

The Future of Quality: Getting Better All the Time

Ronald Snee and Roger Hoerl describe how the “century of quality” and job creation can be achieved through, among other advances, addressing the inevitable role of human variation in innovation. The authors believe that the need for quality improvement will continue as customers demand quality products and services.

The authors describe five specific advances to achieve greater levels of performance needed for improved quality.

• Applying a holistic improvement approach that includes all processes. Such an approach views an organization as a system that can be improved at any location, culture, or in any business function.

• Focusing on identifying and solving mission-critical problems. This can be accomplished through a statistical engineering approach, which uses five building blocks—identifying a problem, creating structure, understanding the problem’s context, developing an over-arching strategy, and creating tactics.

• Using big data to solve problems that were previously deemed unsolvable. Collecting manufacturing data and integrating it with customer data can help improve both products and processes. At that same time, the authors caution that problem solving still requires attention to the sequential nature of problem solving, strategic thinking, data pedigree, and subject matter knowledge. These fundamentals are all related to the statistical engineering philosophy, and because big data are frequently associated with complex and unstructured problems, a statistical engineering approach with its concepts, methods, and tools is well suited to solve such problems.

• Learning how to better address human variation. Humans are likely the largest sources of variation. Improvement strategies, therefore, must do a better job of accounting for human variation because short deadlines, fear of failure, and inadequate budgets can all result in products and processes that don’t take human variation into account. Quality professionals can manage human variation by creating products and processes that can perform well even in the instance of human inattention or a lack of either experience or expertise.

• Enhancing learning on innovation to create jobs. Not only can quality improvement lead to more jobs but it can also protect existing jobs by creating new technology and designing products and processes that lower material and labor costs. This increases economic opportunity as well as the standard of living.

The five advances detailed in this essay can produce major improvements and create a real competitive advantage for organizations as they enable leaders to think broadly about continual improvement opportunities.

Preparing for the Future

The 2015 Future of Quality Study also includes a thought-provoking set of questions that can be used to determine if an organization is ready for the future (see http://asq.org/future-of-quality/files/2015_Future%20Study_flyer.pdf), as listed below:

• Do you train the next generation of leaders in preparation for the changing workforce of the future?

• Do you have a flexible business strategy that can adapt to changing customer expectations?

• Do you personalize the customer experience?

• Do you apply holistic improvement approaches to help gain a competitive advantage?

• Do you leverage big data, maximizing analytics to make smart business decisions?

• Do you have the proper corporate infrastructure that will adapt to the ever-evolving business landscape?

• Do you have a strong culture of quality to enhance business performance?

• Do you have an efficient global supply chain system that ensures business continuity?

• Do you protect your digital assets through effective IT security?

• Do you deploy a next-generation sustainability model that will positively impact your business and brand?
Thinking Ahead

Why has ASQ been investing such an intensive effort every three years to consider the future? Why should ASQ members and their organizations care about these studies? The reality is that no one—no matter how experienced or perceptive—can predict the future, but that’s not what ASQ is trying to accomplish with these studies. The Greek philosopher Socrates is credited with advocating a form of inquiry and discussion between individuals, based on asking and answering questions to stimulate critical thinking and to illuminate ideas—now known as the Socratic Method. These future studies are not intended to be prophetic but to stimulate deep thinking and create an incentive to prepare for the future—whatever it may hold. The views of the essayists in this year’s study may not align to form a roadmap to the future, but they undoubtedly provide a foundation for discussion and debate and may foster new ways of thinking about and responding to whatever actually transpires.

More Online


Janet Jacobsen

Janet Jacobsen is the associate editor of The Journal for Quality and Participation and serves as a contributor and copy editor for other ASQ publications. She is the former communications manager for the Registrar Accreditation Board. Jacobsen can be reached at janetjake@msn.com.
The Course of Change Over Time

Deborah Hopen
President, Deborah Hopen Associates Inc. and ASQ Past Chair

ASQ now has completed six Future of Quality Studies, and it now seems appropriate to take a look at the longer-term perspective these analyses provide. As might be expected, some of the key forces identified appear more regularly than others, but the specific nature of those forces has shifted since the first study in 1996. The table on page 32 presents a high-level summary of those key forces.

Globalization

When viewing the summarized key forces, it becomes instantaneously obvious that globalization is the one constant across all of the futures studies. That conclusion may be a bit misleading, however, because the effects of globalization have not been consistent over the past 15 years. In fact, globalization has interacted with quite a few of the other forces over time, generating a substantially different operational climate for modern organizations.

Globalization and Technology. It is impossible to ignore the effect the increasing pace of technological change has had on globalization. Whereas the Internet and ecommerce were newly emerging realities in 1996, they are an everyday business method in 2011. At the time of the first study, organizations had begun to discuss the threat of Y2K and were trying to predict what technological advances would occur in the new millennia. The computer was viewed as the primary technological platform, and almost everyone was learning to traverse the information highway. Not many people guessed, however, that cell phones would become the new computers of 2011, taking over many everyday business and personal applications. According to the Child Trends Data Bank, “In 2009, more than three out of four children (77 percent) ages three to 17 used the Internet at home, more than three times as many as in 1997 (22 percent). Ninety-three percent had access to a computer at home, up from 15 percent in 1984.” (www.childtrendsdatabank.org/?q=node/298) With the increased use of cell phones, email, social networking software, and other similar options, communications are almost instantaneous, and the ability of individuals or organizations to keep problems a secret is almost non-existent.

Furthermore, the “technology of technology” has improved, decreasing the cost of development significantly and making new tools more affordable. The list of technological changes since 1996 and a discussion of their effects is beyond the scope of this analysis, but one thing is clear—technology is making it possible for globalization to expand to the far reaches of the world and to do so more rapidly and at a lower cost.
Globalization and the Marketplace. As many organizations began to conduct business across the globe, they were faced with difficult choices regarding products and service design and delivery. In 1996, it was noted that the focus on customers was increasing. By 1999, the need for customization and differentiation of products and services and shifting demographics offered implications relating to future requirements for goods and services. In this most recent study, it has been noted that consumers are becoming increasingly aware of their options; are learning more quickly of positive and negative attributes of products, services, and the organizations that provide them; and are expecting more responsive offerings. Although it is well-understood that people from different cultures with different lifestyles will have different expectations, the rapid spread of the global marketplace has forced organizations to grapple with the need to customize offerings appropriately versus the cost of doing so—and that cost includes the effects of increasingly complex operations in a world that is aggressively pursuing simplified processes with less waste.

Globalization and the Workforce. As organizations expand their realms, it is inevitable that the way they conduct business will change. Technologically-based services can be provided from any location, so there has been a shift since 1996 to outsourcing that often occurs outside the sponsoring organization’s homeland, as was mentioned in the 2005 key forces. On the other hand, it may be more effective and efficient to produce and/or deliver some products and services near the customer base, which may be addressed through partnering (predicted in the 1999 study), outsourcing, and/or local operations.

Beyond that, however, is the effect of rising immigration rates across the world which also has a profound influence on workforce trends. In 2006, the Population Division of the Department of Economic and Social Affairs of the United Nations Secretariat reported, “In 2005, the number of international migrants in the world reached almost 191 million, which was 3 percent of the world population. Between 1990 and 2005, the world gained 36 million international migrants.”

On one hand, these dynamics place new demands on organizations, including how to keep far-flung employees up-to-date and trained. On the other hand, the rise in knowledge management systems and self-paced training are proving to offset some of these issues. Interactions among workers, customers, and stakeholders associated with language and cultural differences still remain a challenge for many organizations, however.

The aging population that has been mentioned in the two most recent studies also is having an impact on organization capabilities, and that trend can be expected to continue for quite a while into the future. The newest members of the workforce, the millennial generation, bring new ideas and approaches, but they lack the wisdom of experience which is being lost as the baby boomers retire. This drain not only decreases the opportunities for mentoring, but it also changes the ways leaders must manage the workplace.

Globalization and a New View of Individual and Organizational Responsibility. As early as the 1999 study, “Environmental Sustainability” was included as a key factor. In 2008, both “Environmental Concerns” and “Social Responsibility” made the list. The current study raised these issues to a higher level, called “Global Responsibility.” There is a growing understanding of the relationship between individual and organizational decision making and the sustainability of this planet. The need to scrutinize every decision for its potential ramifications on consumers/ customers, workers, communities, and the environment has become an organizational imperative, as stakeholders focus more closely not only on products and services but also the footprint organizations create and as a byproduct of their operations.

The Role and Practices of Quality

When ASQ launched its first Future of Quality Study in 1996, the intention was to provide members and other stakeholders with a view of key factors that might influence the profession and the application of associated principles and tools. At that time it was recognized that quality had begun to be introduced to new areas, including healthcare, government, and education. Furthermore, it had become obvious that the role of quality as a specialty function was shifting, and quality was becoming an organizational leadership and management strategy. The need for quality professionals to prepare to integrate their fundamental knowledge and skills with broader managerial assignments was clear. The future focus would be on creating value for the organization.

Over the next six years, this prediction increasingly became the reality as quality-related duties gradually were absorbed into management systems, and the responsibility for quality was incorporated into every job. An economic downturn had occurred at the beginning of the new century, and growing pressure existed to prove emphatically that quality was more than a “feel-good” concept and that it made an incontrovertible contribution to economic success and long-term viability.

By 2005, a new concept of value creation had emerged—the triple bottom line (societal, environmental, and financial results)—and quality practitioners were being required to think and behave differently. Whereas the historic focus had been on processes and their inputs and outputs, a greater understanding of the more complex effects of systems of interdependent processes on performance outcomes had evolved. The competencies for individual success changed substantially, requiring equal attention to both the strategic and tactical levels. Additionally, the traditional technical tools were no longer sufficient; a wide range of people skills were necessary to build knowledge, skills, and commitment within the workforce.

So, where will the quality profession go next? The panelists in the current study believe that it will escalate to the enterprise and inter-enterprise levels. Interactions among organizations will become increasingly important with the opportunity for disconnects to
generate widespread and rapid negative consequences because of globalization and technology. Once again, individual success will be determined largely by an individual’s ability to learn to adapt and grow professionally—quickly and continually.

Preparation for Change

Complacency is not an option, and it hasn’t been for many years. Key factors related to change and innovation have appeared in most of the ASQ Future of Quality Studies. ASQ, its members, and other stakeholders need to continue to be prepared to address any new challenges that emerge creatively—whether they relate to values, approaches, techniques, or other areas. Clinging to the past is certain to jeopardize personal and organizational success in a world that moves at today’s pace.

Although it’s true that no one can predict the future accurately, the studies ASQ conducts do provide invaluable insight into the key factors that are expected to have influential effects. Looking back over the six completed studies, it becomes clear that we can chart the course of change over time and use that analysis to take advanced action to prepare for the changes that will occur.

<table>
<thead>
<tr>
<th>SUMMARY OF KEY FORCES IN ASQ FUTURE OF QUALITY STUDIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>---</td>
</tr>
<tr>
<td>1</td>
</tr>
<tr>
<td>2</td>
</tr>
<tr>
<td>3</td>
</tr>
<tr>
<td>4</td>
</tr>
<tr>
<td>5</td>
</tr>
<tr>
<td>6</td>
</tr>
<tr>
<td>7</td>
</tr>
<tr>
<td>8</td>
</tr>
</tbody>
</table>
Evaluating candidates’ likelihood for success in new positions requires an in-depth talent analysis—not only what they do, but also who they are.

A Whole-Person Analysis Is Critical to Finding the Right Talent

Stu Crandell

What are the key factors that determine whether or not an individual gets hired or promoted in an organization? Why is it that so many of these critical talent decisions end in failure?

Today when organizations are working to identify and promote individuals, a holistic picture of all of the capabilities which those people can bring to the table needs to be adopted. The ramifications of not taking a “whole-view” approach can be significant and may impact financials, engagement, employee morale, productivity, and retention. Add these all up and that’s a big cost to an organization’s profit and loss account.

In a 2014 Korn Ferry global study on succession management,1 more than 1,000 survey respondents from 54 countries, representing companies with 500 to more than 50,000 employees, cited having the right competencies for a role as the number one factor for making a promotion decision, but nearly two-thirds (63 percent) said that a lack of well-suited traits and dispositions for a company’s culture was the biggest reason that promotions fail. Think of it this way: People should be promoted for both what they do and for who they are.

To examine this issue more deeply, begin by looking at the four dimensions of leadership and talent shown in Figure 1, which include elements of what people do (competencies and experiences) and who they are (traits and drivers). Competencies are core skills and behaviors needed to succeed in the role, and experiences showcase the individual’s preparation and functional pedigree. On the other hand, traits are the natural tendencies that a person displays, and the drivers are related to what motivates the person and what is his/her personal sense of mission.

Competencies and Experiences—What They Do

Oftentimes organizations focus only on the first two—competencies and
experiences. These are easier to observe and build; in other words, these are the skills the individual possesses and the various leadership and functional assignments and challenges to which the individual has been exposed. These effectively cover the job description and can be assessed in the usual ways by examining a résumé or via competency-based interviewing.

The survey confirmed that having compatible skills and competencies was the main driver supporting promotion decisions. The good news is that organizations are considering what the person needs to do in order to perform in a different and more challenging role. Most organizations know that the best salesperson is not necessarily the best sales leader or the best programmer is not necessarily the best IT leader. Someone leading a functional area will, in all likelihood, have deep domain knowledge on which to draw, but will need new competencies if promoted to a general manager role.

Clearly, depending on the leadership level, the crucial competencies required will change. Top executives need to have more strategic competencies than lower-level managers, where tactical execution skills are more important. Organizations that make promotion decisions based on whether the person being considered is ready—in other words, has acquired enough of the new competencies and enough experience with the right stretch assignments—are likely to make better promotion decisions.

### Traits and Drivers—Who They Are

Despite the focus on competencies and experiences, however, many promotions still fail. This is often due to a lack of attention to the candidate’s traits and drivers. Traits are the inclinations, aptitudes, and natural tendencies that may influence a person’s leadership and interpersonal style. Some experts in this field believe that traits may be hard-wired and are largely unchangeable. Many times, though, the traits a person possesses create the foundation for that individual’s career success.

For instance, a person who has a natural take-charge style may develop into a strong leader if he/she gains the right kinds of experience. A person who is highly learning agile may develop the skills to become a general manager and lead a group through different kinds of change. A person who is naturally organized and detail focused may become very effective at driving business execution. The leader who loves to negotiate and take risks may become great in a corporate development role working on deals in merger and acquisition situations.

At times, the traits that are most critical depend on the business strategy and life cycle of an organization. For example, in a startup, leaders typically need a high tolerance for ambiguity and the ability to take risks. Sometimes these traits can work against a person, however, and what was an asset earlier in that person’s career can become detrimental later when he/she is considered for higher levels of leadership. Take the person who is naturally detail oriented, for example. As a middle manager, the attention to detail may have contributed to his/her success, but as a senior executive, he/she may be seen as a micro-manager who focuses too much “on the weeds” to be strategic.

Some traits may be detrimental at any level, but they may be overlooked earlier in a person’s career because of a track record of achieving results. For example, many have encountered aggressive leaders who are seen as high potential and are promoted quickly, but their intimidating style starts to burn bridges with their peers on the executive team. All too often, these derailing traits were not addressed early in their careers, but once promoted to the executive level, those traits block their promotability.

Fortunately, many of these situations can be addressed with appropriate development and
coaching. Although it is difficult to change hard-wired traits, a person can, through self-awareness, learn how to keep derailing tendencies at bay and/or compensate for areas where he/she is not as naturally strong. CEOs with an operational mindset, for example, may not become strategists, but they can surround themselves with executives on their team who have a strategic perspective. They become skillful at leading the organization through a process that arrives at the right strategies. Another example is the general manager who knows he/she is prone to taking big risks, so this manager ensures that a strong finance leader is available who can confirm that the business case is sound. If these incompatible and/or derailing traits are not addressed, however, they frequently will cause the person to fail.

Drivers are the other attributes that define people. These are the values, motivators, and interests that influence a person’s engagement. What motivates and engages people? Examples of drivers include power, status, autonomy, and challenge. These are often very core to the person and may change little during the career. Other types of drivers include a person’s career aspirations. Does the person want to run a business or become a functional leader? Is this person motivated to take on higher levels of responsibility? These aspirations also may change over time for a variety of reasons such as family issues; a person may not seek the next promotion or the exciting expat assignment now, but may be very willing to take the assignment a year later when circumstances change.

It is critical to focus on the person’s drivers when making promotion decisions because not everyone has an interest in shouldering broader responsibility. This can happen at any level in an organization. In fact, when Korn Ferry interviewed 79 external and internal CEO candidates from 2010-14, almost one-third were either ambivalent or flat out didn’t want the top jobs. All too often it’s assumed that the person will have an interest and a desire for that next leadership role, whereas in reality, that’s often not the case.

It is also essential to understand what will be motivating—and frustrating—about the particular role or leadership level for which the person is being considered and whether these match his/her drivers. A role that requires working effectively through a matrix-style structure may prove very frustrating for a leader who is accustomed to being a general manager and likes to be in control. A role that involves an expat assignment may be exciting to some but intolerable to others.

**Summary**

Too many failures with succession management come from the limited focus on who the leader is—his/her traits and drivers. It is critical to look at the entire person, not just the experience and competency sets. The traits and drivers are important for determining whether the person is the right fit for the culture surrounding the role, whether his/her engagement level will be high enough, and whether he/she will derail.

The difficult part comes in assessing and developing talent, so be rigorous with data and ensure that the right information on the organization’s talent is available—know who is ready, how to close the gaps to build capabilities, and determine whether the candidate will be the right fit for bigger leadership roles in the future. Organizations, therefore, need to have strong internal and external assessments and development plans—particularly for pivotal talent who are targeted for mission-critical roles. Leaders should then be enabled, equipped, and able to spot top talent.

By not focusing on traits and drivers, organizations are making decisions based on a limited set of information. Factors considered need to go beyond understanding the competencies and experiences of candidates so that more informed decisions will be made about the individuals who are ready and will best fit into the specific role.

**Reference**


---

**Stu Crandell**

Stu Crandell is senior vice president for global offerings at Korn Ferry Institute, Leadership and Talent Consulting. He consults with leading organizations on CEO and C-suite succession, executive assessment and development, talent strategy, succession management, and high-potential identification and development. Prior to this role, Crandell was responsible for running the Solutions Portfolio Group of PDI Ninth House, a Korn Ferry company. Contact him at stu.crandell@kornferry.com.
In my April 2015 column, a new tool, the energy bar, was introduced. It is simple to use and can help you engage the people who need to support your quality endeavors. The concept associated with this tool is that to begin shifting stakeholders’ energy from indifference to interest or resistance to support, you need to know their current energy level. Without that vital information you’re flying without radar, and that’s dangerous. Now, it’s time to dig a bit more deeply into how you find out where the energy is and whether the stakeholders are likely to support you or resist your initiative.

**Generate the List**

The use of a list to propel change has been discussed frequently in past columns, and “the list” for a project is a very specific component of the process. The list is the foundation for any work that you do in your organization. If you don’t know what’s on the list—or stakeholders don’t know—then any strategy is just a wild guess about what might work.

Sometimes when you ask leaders, “What’s on the list?” they know the answer immediately. Most times, however, they don’t have a good idea why people might support or resist the proposed new approach. It’s not that these leaders are unskilled or don’t care; rather it’s that other people don’t express their perspectives candidly.

Here are four questions you can ask when meeting informally with individuals or small groups; you also can create an anonymous four-question survey to obtain this information. Of course, you should adapt these questions to fit the situation in your organization.

1. **What are your thoughts about all the talk related to improving quality?** You’ll notice that this is an open-ended question, which generally works far better than a scalar-rating question. With open-ended questions, you hear the respondents’ stories, and those can be quite illuminating.
2. **What are your reactions to the thought that you might need to change?** Note that this question doesn’t lead the stakeholder’s response. Don’t ask, “Do you feel good about this change?” or “Are you scared about this initiative?” A neutral, open-ended question will provide responses that provide greater insights.
3. **To what extent do the leaders of quality in your organization have what it takes to lead a change such as this?** If you’ve read this column over the years, you’ll realize that these first three questions address the Level 1, Level 2, and Level 3 issues summarized in the sidebar.
4. **Is there anything else you’d like to add?** Sometimes people don’t respond to this question. Other times, they offer important nuggets that weren’t shared when the first three questions were asked.

Once you’ve gathered this information, you can divide the comments up according to the three levels and generate the list, as shown in Figure 1. Bear in mind that some comments might address more than one level, so, include them in two or three places, if appropriate.

Then you can step back and evaluate what you see on the list. Get interested in what you see. For instance, here are some questions you might consider.

1. **Are there any sections with very little information in them?** This can be good news, if the majority of the comments that were received were
supportive. Of course, it also can be problematic if there are more comments in the resistance column. It also might indicate that you weren’t able to obtain answers to those questions with few responses because respondents held back their opinions.

- **Do stakeholders’ seem to understand the current conditions sufficiently to get interested in the need for a change?** This question engages you in addressing Level 1 strengths and opportunities for improvement as you develop your change plan.

- **How can you leverage the enthusiasm and excitement that was expressed?** What can you do to lessen or remove the reason for fear and apprehension that was shared? Specific approaches for dealing with these Level 2 reactions are an essential key to success for your project.

- **Do the stakeholders trust you and have confidence in the leader’s ability to accomplish this change?** If not, that’s where you need to start working on the Level 3 issues. If you aren’t trusted, the talk and slides associated with Level 1 probably won’t win people over to the change. This issue also may provide a reason for the Level 2 issues that you uncovered.

As you become more adept at getting people to respond to the four questions used to develop the list, you should be able to generate a plan that resolves the initially identified changes and paves the way to successful change. For more information on the energy bar, watch the short animated video at www.rickmaurer.com/energybar. A free e-book, *The Magic List*, also is available at http://www.rickmaurer.com/magic-list/.

---

**Rick Maurer**

Rick Maurer is an adviser to people who lead change in large organizations. He recently released the new paperback edition of his classic book *Beyond the Wall of Resistance: Why 70% of All Changes Still Fail—and What You Can Do About It*. You can access free tools on leading change from Maurer’s website at www.rickmaurer.com.
The definition of connection has taken on a whole new meaning in today’s world that leverages all group members’ contributions but requires some different thinking and skills.

Have You Made the Connecting 2.0 Shift?

Nancy D. O’Reilly

As the world becomes flatter and more connected, what “success” looks like is changing. We hear less and less about the fierce spirit of the rugged individualist, and more and more about the connector who knows how to engage others, collaborate with them, and build productive and mutually rewarding relationships. For professionals deeply immersed in creating cultures of quality—no matter what the industry—it’s clearer than ever that the more minds and experiences there are around the table, the greater the power to grow, achieve, and innovate becomes.

In short, the world is finally, truly recognizing the power of the group—not “group think” but “group synergy.” In an incredibly complex world there is just no way one person (however talented) can have the knowledge, skills, and insights to go it alone. What that means is that the ability to connect with others has suddenly become a vital skill for business and life.

Now, this isn’t about the traditional (and dreaded) “What can this person do for me?” business card exchange, nor the mile-wide-inch-deep world of social media. No, it’s about making a major shift to what is called “Connecting 2.0.”

This deeper level of connecting is about building a real relationship with someone, not just striking a deal or adding another name to your digital Rolodex. This shift helps you grow your career and find success, sure, but it also impacts life outside the workplace. (For those who work in an industry that’s passionate about improving the quality of products and services, it should be a natural extension to want to improve the quality of their lives.)

Whether you’re a budding entrepreneur seeking to start something new, an employer wanting to expand your company, or an employee hoping to “lean in” further, Connecting 2.0 is a skill you’ll want to master. Actually, it’s more than that: It’s a movement you’ll want to join.

The good news is that there isn’t a waiting list or a lengthy application process. You don’t have to meet any prerequisites or bring a particular skill set to the table. All you have to do is have passion, enthusiasm, and a willingness to join forces with others.
Here are some tips to help you get started:

- **Balance your online and face-to-face connecting.** Technology has made it easy to reach out to and network with a large number of people. That’s why so many people have amassed large numbers of LinkedIn connections, Facebook friends, and Twitter followers. While there is nothing wrong with social media, it’s also no substitute for real-world human interaction. The Connecting 2.0 movement depends on both types of connecting: virtual and face-to-face.

  If you’re burning up social media, consider taking an online contact offline. Tell that person you’d love to meet up for lunch the next time he or she is in town. Conversely, if you’re proudly “old school” and are neglecting your social media presence, dive in because you really need a foot in each world.

- **Join a new group that interests you (and it doesn’t have to have the word “quality” in the name).** The nature of the group isn’t what’s important here. You may choose to join a book circle, a kayaking club, or a community cause. The point is that you’re getting together with other people who share a common interest—and that you go to meetings and events often enough to let these strong connections develop. (In other words, don’t just be a name on the roster—be a regular presence in the group!)

  It’s the shared passion for the activity that generates the connections, and those connections take on a life of their own. You may end up forging alliances, finding jobs, or winning clients—even though that’s not the purpose for the group.

- **Think creatively about who you might connect with and why.** Sometimes potential collaborations are fairly obvious. For instance, if you have expertise as a healthcare patient safety consultant but lack experience with bookkeeping and managing a staff, you might partner with another person who does have those skills. Other times, fertile collaborations aren’t so obvious. Think outside the box about who might have the same needs and goals as you.

  For example, let’s say you sell home alarm systems. You could seek out other businesses that have a customer base you’d like to tap into—like contractors and homebuilders—and pay them a percentage for referrals. Some in business even collaborate with competitors. If one person is approached by a client who would benefit more from a competitor’s expertise, he or she refers that client—and vice versa. Ultimately, everyone wins—each professional is able to play to his or her strengths, and the client walks away happy.

- **Find a way to improve the world that also speaks to your heart.** Women and men who care enough about others to volunteer their time, talents, and treasure are the kinds of people you want to meet. They tend to be “other-oriented” and want to make new connections, too. Whether your philanthropic “cause” is homeless animals, kids with cancer, adult literacy, or clean oceans, get involved.

  I actually met the 19 women who co-wrote my book through my Women Connect4Good, Inc., foundation. In fact, the book is living proof of the kind of collaboration that happens when people make connections based on their desire to serve.

- **Join a different team at work.** People tend to stick to their comfort zones, but shaking things up from time to time keeps you sharp and puts you in the path of exciting new people. When you work with people you don’t know on projects you’re unfamiliar with, you will learn, grow, and often discover vital new talents and interests.
• Try not to gravitate toward men and women who are like you. It’s a natural human tendency to seek out and spend time with people who share our viewpoints, opinions, attitudes, and methods. It feels good when others validate how and what we think. On the flip side, however, that’s not how you learn.

Be careful that your efforts to connect and collaborate don’t turn into groupthink or an echo chamber. Instead, seek out men and women who have skills and strengths you don’t already have. Remember that as long as respect and civility are present, debates and disagreements are a good thing. That’s how amazing, higher-level creativity is fueled.

• Think about what you need to learn and who can help you learn it. Let’s say you have a small catering company specializing in weddings, parties, and family reunions. You’d like to expand into the business conference arena but know nothing about the field. You might reach out to someone who plans such conferences and offer to trade services—perhaps cater an upcoming event for free or for a greatly reduced price—in exchange for the chance to learn and get a foot in the door.

Note that you’re not asking for something for free here. You’re also bringing something to the table. The Connecting 2.0 movement isn’t about free lunches; it’s about combining forces. In this example, who knows? The other entrepreneur’s clients may love your fresh approach, and it could result in the two of you starting a whole new venture.

• Seek out mentors, and don’t assume that anyone is off limits. You may assume that you need to limit your professional connecting to people who work in your industry or who are within a few rungs of you on the corporate ladder. This is not true. The world is full of all kinds of people, in all types of industries, and at all levels of authority with whom you might mesh perfectly. In an ever-flattening world where hierarchies and titles are less important than ever, it doesn’t make sense to categorize potential collaborators this way.

Don’t let how busy or important another person is hold you back from reaching out to that person. If you want to learn from a thought leader or C-suite occupant, ask. You may be pleasantly surprised by how willing successful women and men are to share ideas, best practices, advice, and support—even with so-called competitors.

• Likewise, give back to others who can benefit from your expertise. Live by the rule of reciprocity. Don’t just seek out mentors. Serve as a mentor to people who can benefit from your knowledge and experience. It’s good karma, and it can pay off in unexpected ways.

• Be a lifelong learner—take a class. Whether it’s continuing education for your job, an art class at the local community college, or even a martial arts training session, actively pursue new knowledge and skills. Don’t just sit there in class, either—when appropriate, talk to your neighbor. This will bring new and interesting people into your life—women and men who, just by being there, show that they have a zest for life and learning.

• Take to the podium. Yes, yes, you hate public speaking. Many people do, but speaking in public is a powerful way to get your voice heard, build up your confidence, and, of course, to make new connections with those who hear you speak. There are many civic and service organizations—like the Chamber of Commerce and Rotary Club—that need speakers.

• Handpick five to 10 powerful individuals in your community and ask them to participate in an event. This might be a roundtable discussion that takes place at an industry conference or a community fundraiser, for example. Don’t think that busy, important men and women won’t have time for you. You might be surprised by how many will say yes.

• When you receive an invitation, say yes. When someone invites you to an event or gathering—whether it’s an industry trade show, a party, or a hiking trip—go if you can. Yes, even if you’re tired, out-of-sorts, and feeling blah. There are always reasons to say no and some of them are good reasons, but overall, life rewards action. Life rewards yes. The more times you say yes, the more connections you will make. The more connections you make, the richer and more creative your life will be.

• Set a goal to meet “X” new people per month. Good intentions don’t mean much when it comes to successfully connecting with others. If you don’t have a finite goal to work toward, it will be all
too easy to “think about it tomorrow,” Scarlett O’Hara-style. Come up with a finite number, depending on your circumstances and personality. Quantifying your intentions will force you to be accountable. (It will help greatly to keep track in a journal or calendar). If you take this metric seriously, you’ll figure out how to make it happen. While meeting isn’t the same as connecting, it’s the essential first step.

Let’s say your goal is to meet five new people this month, and it’s the last day of the month and you have two to go. You can always pop into the spin class at your gym or maybe go to an open house or political rally. While you’re there, of course, strike up conversations with at least two individuals and introduce yourself. Voilà! You’ve met your goal!

Over the course of human history, many wise people have observed that we become like the people with whom we spend the most time. Make the effort to seek out and work with as many smart, talented, passionate people as possible. Together, we can use the power of the group to change lives, industries, communities, and the world!

Nancy D. O’Reilly

Nancy D. O’Reilly, is an author of Leading Women: 20 Influential Women Share Their Secrets to Leadership, Business, and Life as well as a clinical psychologist, motivational speaker, and women empowerment expert. O’Reilly is the founder of Women Connect4Good, Inc., and for seven years she has interviewed inspiring women for online podcasts available on her website. Contact her at www.drnancyoreilly.com.
Within the field of quality, we take great measures to address variation. We employ statistics and associated methods to control variation. We erect quality management systems to manage variation. We execute audits and draft findings to combat variation. In the practice of lean, we extol the virtues of standardization and censure the inefficiency that flows from variation. In general, when elimination of variation is not possible, the minimization of variation becomes the acceptable "next best thing."

Strangely, our desire to eliminate variation is not a passion that is shared universally. The poets, for example, remind us of the inspiration and beauty that dwells within variation. Is it possible to leverage the power and possibility that dwells within variation while simultaneously mitigating its risk and uncertainty? This article explores alternative paths, offering some new ways of thinking about the work of the quality professional.

Consider Poetry
In “Pied Beauty,” Gerard Manley Hopkins lauded “dappled things” and “skies of couple-colour as a brinded cow.”1 Hopkins’ vocabulary is daunting but, like a well-crafted design of experiment (DoE), the meanings are accessible. The adjective “pied” is frequently associated with the story of the “pied piper.” The piper was pied in that his attire was made of many different materials and consisted of many colors. Dappled and brinded are adjectives and, like pied, refer to a whole that is replete with variation. A brinded cow, for example, has a coat of contrasting markings and colors.

With an efficiency that would be admired by any lean practitioner, Hopkins has employed a terse economy of words to offer a contrary accounting. Variation, as framed through Hopkins’ poem, is elemental to human experience. Variation is elemental in the sense that it inspires us. We, like Hopkins, do not hope for a singularity of color at sunset but desire a glorious mix of color, pattern, and intensity. We long for variation in this instance because we are somehow nourished by the beauty and wonder that flows through and from the variation present.

Variation, as glimpsed through Hopkins’ poem, is also elemental to human experience in that it is present in the four core elements of water, fire, sky, and earth. The nonpredictability of variation, its fluidity, is suggested by the “rose-moles” found in rows (or “stipples”) upon “trout that swim.”1 The color, size, and shape of these colorings,
although nested in lines or linearity itself, defy precise ordering. Hopkins was moved by the markings not because of the elements of order present, but due solely to variation in the markings in spite of the order present.

The “firecoal” coloring of chestnuts as they lay upon autumnal grounds sketches variation in at least two ways: variation dwells within the coloring of the chestnuts, and; variation may be found in the reflections so often born of these fallen objects.1 The “fire” experienced through our reflections is as plural as the number of viewers, the moments viewed, and the moments spent viewing. The “fire” so named may spur us and light us ablaze, merely warm us, scar us, or may even consume us. To feel is an experience that is remarkably diverse, equally as present as the cognitive or rational response, and is also fundamentally human.

The vitality of variation, its power to lift us, may be observed among the differences visible in “finches’ wings.”1 These differences may be glimpsed only when the wings are spread or the finches are moving artfully in the air above us. Landscapes, in their “plotted and pieced” appearances, afford us a window, first into the beauty of variation and then into the nourishment that will spring from the earth below us.1 Variation ought to be lauded, mused the poet, as it frames the heights and depths of experience.

While we might not agree with Hopkins concerning the beauty of variation, the persistence of variation is undeniable. Variation is a “something,” to quote Robert Frost, “that does not love a wall.”2 It creeps in and like a “frozen-ground-swell” causes our plans, our walls, to “spill like upper boulders in the sun.”2 Poetic waxing aside, variation can introduce regulatory exposure, impede yields, and even lead to catastrophic failures. The potential risk associated with variation ranges from loss of product through loss of money and may potentially result in the loss of life. In other instances, quality itself might be mended by not “wear[ing] our fingers rough” and “sett[ing] the wall between us.”2 When admitted, variation can, at times, inspire us and act as the seed of innovation; as in the beauty of a sunset, variation can be a blaze toward an emerging future state.

To Turn, Turn Will Be Our Delight

Is it possible to leverage the power and possibility that dwells within variation while mitigating the risk and uncertainty born of variation? One remedy is obvious but unexpected; turn away from the business at hand. It may seem trite or even irresponsible to assert that we ought to make room for experiences like marveling at finches’ wings. Efficiency and a structured economy of time are deemed central to the successful delivery of quality. We seek efficiency in the hopes that if we can save time, and hopefully save time on time, value will rise. When value increases, it is believed, improvement will be introduced, stability will be established, and optimization will reign.

It is often the case, however, that the more adroit we become in saving time, even when saving time on time, the more diminished we become. We find ourselves not only pressed for time but pressed by time. Caught in the grind between the ever-present need to demonstrate and introduce value and the pressure to keep pace with a self-imposed ever-increasing workload, time constricts us through the delimiting of purpose. Even if Hopkins is correct about the beauty of finches’ wings, who has the time or the strength to look upward and marvel at such trivial things? We have projects to keep and “miles to go before we sleep.”2

In this case, hope really is “a thing with feathers.”1 If we dare to turn from our “usual course” and stop “steering like pilots by certain well-known beacons,” we may have the good fortune of becoming what Henry David Thoreau referred to as being lost.1 Once lost, freed from the well-worn ruts set by common sense and reasonable expectations, we begin to “appreciate the vastness and strangeness of nature.”4 While lost, we must “learn the points of the compass again.”4 Through being lost, “we begin to find ourselves again” and have a chance of glimpsing the “infinite extent of our relations.”4

From this “New Angle-Land,” we may begin to perceive connections that were hidden previously.4 These new connections are the seeds of what may be. If we allow our purpose to be controlled by the ticking of the clock and the grim pursuit of efficiency, what may be is lost for the sake of what must be. Inverting the importance of what may be to the priority of what must be is, to quote Shakespeare, the “rub.” In this case, the rub acts as a wall to emergence and innovation.

A Personal Example

Several years ago I organized a charity run across the state of New Hampshire. The run was designed as a point-to-point course that occurred
over several weekends. I fought the temptation to stress time over the experience and stopped to appreciate a view if a scene caught my eye. One such moment occurred near Winchester Center. Immediately prior to taking a sharp course change, I turned my head to check for traffic. In so doing, I caught glimpse of several ancient maples leaning over a quiet and seemingly forgotten stream. There was something about that moment, the mix of reflections and still water, that gave me pause. I stopped and, in silence, let the otherness of what I was experiencing simply be.

I was not really sure what occurred. Why did (and does) that moment, like Monadnock, loom as a peak among a flattened terrain of disjointed experiences? Perhaps, for a brief moment, I allowed the other to be the other. I respected the difference between self and other and did not attempt to define. I let go of the urge to control and command. I stopped glancing at my watch and ignored my mile splits. At that moment, turned from “certain well-known beacons,” I glimpsed the possibility freely found, freely given, and flowing in that moment. As noted by the philosopher Henry Bugbee, “Ours is a holy place, a universe of things, a wilderness.”

Grim pursuits leave little opportunity for the discovery of what may be within the wilderness.

**Ghosts in the Machines**

Turning may help the individual practitioner leverage variation but what of the field of quality itself? Is the orientation of our field optimal for leveraging innovation? One bearing on our orientation is gained through a consideration of organization charts. We place a great deal of stock in the ability of a two-dimensional representation to convey meaningfully the lived reality of an organization. For example, we may seek guidance from an organization chart early within a DMAIC project. We believe that the chart can help us understand how the pieces of the organization fit together. Key stakeholders, champions, and potential resistance, we hold, may be identified through the chart. Projects and many process improvement events (including kaizens) may refer to organization charts to define ownership or expertise. One of the standard exhibits offered within a quality management systems (QMS) audit is the organization chart. The auditor will ask for the chart for many reasons but one is to gain insight into an organization’s culture. In general, we tend to conclude that the organizational reality, the corresponding authority and power structures, and the organizational culture are “all in stipple.”

The acceptance and use of organization charts is suggestive of one of our field’s philosophical orientations. To help us “think about a reality we can never fully know,” we have likened reality to a machine. Organizations are thought of as machines or, in the least, mechanistically. Organization charts are valuable, by extension, as the linear depiction of the chart reflects the linear reality of the organization. Influence, power, and authority are reducible to simple cause and effect relationships. Like gears in a watch, the larger the gear (the higher one is in the organization), the more power one possesses within the machine. Values and company culture are top-down phenomenon as well; they are manufactured by the big cogs and transferred to the smaller cogs.

Quality, when framed by the reality as machine metaphor, is a matter of keeping the machine in an optimal state. Stability is prized. Variation, when possible, must be eliminated or reduced as it represents a threat to stability. Metaphor aside, there is an undisputed value in stability. In the least, the presence of stability enables the possibility of predictability, the guarantee of measurement, and the promise of control. What role does innovation have within a metaphor centered on stability? The role of imagination is bounded by what must be when this metaphor in play. Innovation becomes a matter...
of finding new ways to preserve the status quo, but different roots will bear different fruits. What if innovation, and not stability, was central to how we collectively made sense of reality?

It must also be asked if the reality as machine root metaphor is adequate. One test of the metaphor may be formulated as a simple question: Is our lived reality as neat and as tidy as the metaphor, or as the organization chart, suggests? In some instances, it seems that the metaphor is perfectly adequate, but in other instances it seems woefully inadequate. Perhaps the search for an adequate root metaphor has grown beyond a singular pursuit of meaning; in this context, perhaps variation has crept in and toppled the wall of semantic singularity? It is possible there are as many ways of making sense of the world as there are contexts. It is also possible that other root metaphors may afford a different place for variation within the practice of quality, and by so doing, may reshape the purpose or purposes of quality/qualities itself.

References


Kurt Stuke

Kurt Stuke has served Adecco, a human resource solution provider for over 20 years. In his current role, he leads the operations auditing and quality group and is responsible for finding creative ways to drive positive change. Stuke is an ASQ Certified Quality Auditor (CQA), Manager of Quality/Organizational Excellence (CMQ/OE), Quality Improvement Associate (CQIA), and Lean Six Sigma Black Belt (LSSBB). Contact Stuke at kurt@kurtstuke.com.
When a new approach becomes the rage, it’s not always easy to see how it can be integrated with existing methods, rather than replacing the old.

Design Thinking and PDSA

Don’t Throw Out the Baby

Barbara A. Cleary

The concept of “design thinking” has taken the world by storm. From architecture schools to the fifth-grade classroom, this collaborative process focuses on ways that skills are employed to match customers’ (users’) needs and focus on problem solving to help organizations become more creative and innovative. Countless books and articles have generated interest in the approach, with case studies that attest to its success in large and small organizations. Like so many other approaches to problem solving, the concept is sometimes seen as a panacea that will indeed be sufficient to bring about innovation. It may not be time, however, to throw out tried-and-true tools for improvement in the interest of jumping to the newest language of innovation. In fact, these earlier approaches often provide fundamental content for this newest best thing.

While MIT’s “Short Course” in design thinking offers a 10-step approach to the design process, and Stanford’s notable Design Thinking Action Lab (part of the university’s design college) provides opportunities to “tackle real-world innovation challenges,” these and other how-to courses and books are often targeted for engineers, design professionals, and architects. Tim Brown’s book, Change by Design: How Design Thinking Transforms Organizations and Inspires Innovation, is sometimes seen as the Bible for design thinking in business; yet—like other courses and materials—offers primarily case studies exemplifying successes that have ensued from the application of this approach rather than how-to approaches to design thinking.1 Dean of the Harvard Graduate School of Design, Peter Rowe, describes an “underlying structure of inquiry common to all designing.”2 The approach has come largely from architecture and urban planning research. A blurb on the cover of The Brown Book of Design Thinking establishes characteristics of the method: “As a thinking tool, design thinking fosters the ability to combine: empathy of the context of a problem, creativity in the generation of insights and solutions, and the skill to materialize these solutions through iterative prototyping.”3 Taught as a course at Stanford since 2004, design thinking has focused on business practices and customer satisfaction as well as architecture.
and planning. Architect and author Russell Ackoff popularized the concept of “idealized design,” in which a process begins by envisioning its end (and its end user), then working toward that end.4

What might be helpful to the quality professional looking to incorporate elements of design thinking with earlier approaches is to understand the ways that these established methods, including Walter Shewhart’s plan-do-study-act (PDSA) cycle of improvement, may, in fact, represent an earlier way to innovate and improve organizations. At the very least, it provides useful tools for the process of design thinking and for breaking down its steps into measurable units.

One structured approach to design thinking developed by the Stanford Design and Thinking Lab begins with what is known as empathy, or identifying the needs of those for whom the design is being created as shown in Figure 1. A team approach ensures collaboration in this process, and a team begins by identifying those who indeed are users or customers of a given process. Sound familiar? In the seven-step improvement process based on the work of management guru W. Edwards Deming, the first step involves understanding a current system or process by defining it.5 This step includes knowing the customer, collecting data about the ways in which a process currently operates, and analyzing that data using statistical methods. As the first step in the PDSA cycle (Figure 2), it involves thinking through a current situation thoroughly before beginning steps to improve it. Corresponding to design thinking’s “empathy” stage, understanding the customer becomes one of the early steps in the PDSA cycle.

Outcomes of the define-the-system step include identifying:
- Customers
- Customer needs
- System purpose
- Customer expectations
- System resources

Other parts of the “plan” stage of the cycle include documenting the current agreed-upon way of doing things and developing a system for learning about the performance of the system. These steps are represented in the Stanford model for design thinking as “empathize” and “define,” involving identification of users. The PDSA cycle is more insistent on collecting and analyzing data throughout the process, as well as designing a measurement system to assess the progress from the current approach to whatever plan or solution eventuates. The seven-step expansion of PDSA was developed as part of the Transformation of American Industry training program in the late 1980s,6 and draws from the earlier quality circles movement as well.

Design thinking offers a third step, called “ideate” in the Stanford system. This includes generating a range of possible solutions. The PDSA approach moves to “analyze causes” that begins to develop a theory for system improvement. It is important to recognize this as only a theory, which must be tested
and then standardized after it has proven itself in solving a problem or improving the system. As part of the “do” phase of the process, it involves using specific statistical and problem-solving tools, which may include force field analysis, affinity diagrams, cause-and-effect diagrams, control charts, Pareto, and capability analysis. The phase known as “study the results” offers some of the same activities as the “prototype” or “iterative prototyping” step of the design thinking model. While the prototype is communicated to others, the PDSA step focuses on more data collection and analysis to see if the theory works—something the design thinking model includes in its “test” phase. If it does work on a small scale, it is expanded and standardized, the first part of the “act” step, which also includes continued data collection and analysis in order to plan for ongoing improvement and begin the cycle again.

Clearly, the PDSA approach to improvement and innovation depends far more on data-based decision making, and involves collecting data at each step to verify the validity of that step. The design thinking model also includes data collection, although this collection and analysis is often based primarily on small focus groups or face-to-face interviews to foster understanding of the customer, rather than data collection related to a current system. In a problem focusing on communication, for example, design thinking teams might generate questions for interviews, carried out in face-to-face ways. In the PDSA model, on the other hand, data analysis might address metrics such as the number of emails and print materials currently distributed, the makeup of the customer base, etc. In other words, the data for PDSA analysis must be measurable, while interviews and focus groups provide more anecdotal data.

The steps outlined by what is known as Six Sigma methodology are similar: DMAIC, or define, measure, analyze, improve, and control. These outline the path toward improvement in a system originally designed by Motorola for the manufacturing process. One can discern the PDSA pattern in these steps when they are carefully defined.

If patterns that are perceptible in these approaches to innovative problem solving and process improvement seem similar, it may be that the steps reflect a thoughtful, common sense approach to reflecting on a situation, using teamwork to address it, and coming up with approaches to improving that situation. Most design thinking patterns (including the basic PDSA model) insist on trying an innovation or improvement on a small basis before studying it for outcomes, improving it further (through iterative prototypes, for example), and ultimately rolling it out on a wider basis.

Different environments and industries (manufacturing, service, education environments, for example) may find that different approaches are appropriate. Regardless of the specific approach that organizations utilize, their objectives may remain the same to bring about innovation through improvement of processes and solutions to problems, by focusing on the customer (user) at every stage of the improvement. One can hardly reject this motive, no matter how organizations go about getting to the outcome.

More Online
To learn more about how design thinking can be integrated into the process of education, check “Educator’s World” at http://www.asq.org/pub/jqp/.

References
Whatever one chooses to call the current emphasis on design thinking—backward design, learning by design, understanding by design—the approach offers clear opportunities for innovation and discovery, and has been adopted in classrooms across the nation. Grant Wiggins and Jay McTigue’s *Understanding by Design* (now in its second edition) provides alternatives to the traditional approach to “covering” material and emphasizing only information, rather than developing critical thinking skills.

Design thinking, originally conceived by architects and engineers as part of project planning, has been popularized by Stanford’s design school and MIT’s design program. Both offer approaches to developing design thinking in organizations with step-by-step approaches to innovative thinking.

In the world of K-12 teachers, the resource that is most essential to this process is one that seems to be in least supply: that is, time to understand and think, to reflect on the learning process and help students embrace new approaches to their learning. Teachers can best pursue improvement methods in their classrooms in small, step-by-step increments, and this is where the problem-solving tools used in quality improvement efforts are helpful.

Start with that old favorite, the affinity diagram. Classroom teachers have used it for everything from planning parties to organizing historical data. Providing a quiet form of brainstorming (students work individually, putting ideas on sticky notes, then share ideas by posting their notes), offers a way to stimulate thinking. In classrooms where the students who raise their hands first are the ones to be recognized, it gives other, quieter students a genuine sense of participation. Their ideas are just as valid as the classmate who waves his hand frantically for recognition.

How about using affinity diagrams to help students design their own learning? At the beginning of a term or week or unit, students of all ages can be asked to envision the end of that term or week or unit, and to identify the success that they’d like to have achieved at that point. (“How will I know that this has been a successful unit for me?”) You will find that to these students, “success” does not simply mean getting good grades. Their sticky notes will reflect ideas such as, “I will know how the United States’ canal system developed,” or “I will be able to write haikus related to the books I’ve read,” or “I will know all the parts of a frog.” Narrowing the focus to the current unit of study will help to create concrete, doable outcomes. Taking pride in the possibility that he or she can actually get to that point of learning can develop energy, even enthusiasm for heading in the right direction.

Of course, the exercise must be more than a wish list or dream exercise. The next phase of the affinity exercise would be to select a common outcome for the class by observing which notes have “affinity” or common themes, and can be grouped together. With discussion, a class may settle on a common learning outcome. The next question is to ask students to envision the ways in which they can actually reach that outcome. Again, an affinity exercise may elicit approaches that the teacher has not thought of previously. At the same time, the process shifts the responsibility for the learning process to the learner: if I know that I want to be able to remember all the state capitals by the middle of October, I will focus on what will work for me in ensuring this outcome.

In another application of affinity diagrams, students can contribute to establishing the environment in which learning takes place. A teacher asked students to brainstorm (via sticky notes) the suggestions they had for the classroom and the ways in which it might be formatted, as well as ideas about homework and assessment practices. The output, as shown in Figure 1, suggests that they already knew what practices work best for their learning (but maybe had never been asked).

Problem solving can take many different forms. Designing an answer to a question such as, “How do I learn best?” involves the best aspects of design thinking: understanding the user, designing...
a response, creating a prototype, and testing that prototype. An affinity exercise can clearly support this process.

In the process of testing a design such as one for determining the best approach to a learning outcome, classroom tools can not only support the process itself, but also may have their own learning outcomes. When students organize and group their input through an affinity exercise, for example, they are applying skills of organizing and discriminating data—skills that can be applied far more widely. A cause and effect diagram can have learning advantages as well, and it deserves some attention here.

Let’s say that Timmy, the student who envisioned the possibility of knowing all the state capitals, did not in fact reach that objective. Since Timmy had articulated the possibility as a personal goal, he may feel a deep sense of failure as he falls short of that goal. In a traditional classroom approach, he would be assigned a grade and then be expected to move on to the next unit of learning. In a classroom that focuses on designing a learning environment, however, Timmy’s “failure” offers an opportunity for additional growth. The cause and effect diagram can help.

The diagram is named for its resemblance to the bones on a fish. Instead of a fish head, though, the box on the right would contain the issue at hand. This may be an opportunity to look at the causal relationships that lead to a positive outcome—a winning soccer game, a successful book report—as well as to examine the factors that contribute to failures.

To use the diagram, factors that may have contributed to the outcome (the fish head) are listed on the “bones,” pointing toward the outcome as shown in Figure 2. The graphic offers a visual representation of the relationship among various

<table>
<thead>
<tr>
<th>Figure 1: Student Input</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Class atmosphere/format</strong></td>
</tr>
<tr>
<td>Start class on time</td>
</tr>
<tr>
<td>Have variety in class tasks</td>
</tr>
<tr>
<td>Take field trips</td>
</tr>
<tr>
<td>Be consistent with rules</td>
</tr>
<tr>
<td>Don’t lecture all the time</td>
</tr>
<tr>
<td>Have small group discussions</td>
</tr>
<tr>
<td>Make groups stay on task</td>
</tr>
<tr>
<td>No small groups</td>
</tr>
<tr>
<td>Assign projects</td>
</tr>
<tr>
<td>More projects, less writing</td>
</tr>
<tr>
<td>Group projects</td>
</tr>
<tr>
<td>Have fun</td>
</tr>
<tr>
<td>Have sense of humor</td>
</tr>
<tr>
<td>Tell jokes</td>
</tr>
<tr>
<td>Make reading relevant to us</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Writing</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Hand back papers on time</td>
</tr>
<tr>
<td>Constructive criticism on writing</td>
</tr>
<tr>
<td>Lots of creative writing</td>
</tr>
<tr>
<td>No creative writing</td>
</tr>
<tr>
<td>Help with thesis statements</td>
</tr>
<tr>
<td>Improve writing</td>
</tr>
<tr>
<td>Be fair</td>
</tr>
<tr>
<td>Have a sense of humor</td>
</tr>
<tr>
<td>Don’t call on same people all the time</td>
</tr>
<tr>
<td>Tell how writing is improved</td>
</tr>
<tr>
<td>Not just negative comments on papers</td>
</tr>
<tr>
<td>Give chance to revise writing</td>
</tr>
<tr>
<td>Don’t grade first draft of papers</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Homework</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Reading assignments that are short</td>
</tr>
<tr>
<td>Not too much homework</td>
</tr>
<tr>
<td>Make homework count</td>
</tr>
<tr>
<td>No homework over long breaks</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Assessment</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Tell us how things are graded</td>
</tr>
<tr>
<td>Be clear about why we do something</td>
</tr>
<tr>
<td>Grade papers and get them back fast</td>
</tr>
<tr>
<td>Don’t give tests on Mondays</td>
</tr>
<tr>
<td>No pop quizzes</td>
</tr>
<tr>
<td>Have quizzes on daily reading</td>
</tr>
<tr>
<td>Be sure we know how projects are graded</td>
</tr>
</tbody>
</table>
factors, and, in particular, establishes causal connections. To be sure, young people often have difficulty in assessing factors that contribute to a particular outcome, and this visual support helps them do so.

In this case, let’s look at the factors that have contributed to Timmy’s falling short in learning the state capitals. He might create the following list by brainstorming with his teacher, his parents, or his classmates:

- Book was lost for a week
- Did not practice consistently
- Played video games instead of studying
- List was not complete
- Computer died
- Left list at school
- Lost track of due date
- Did not organize study time

Some of these items relate to the materials such as the book or the list. Others focus more directly on the methods that Timmy brought to his study—playing games or not organizing study time. By examining the factors that actually contributed to the disappointing outcome, Timmy is also reflecting on how he might proceed with his next planned task.

Teachers often find that they must accomplish many things at once, and the learning tools that can contribute to design thinking must also do this kind of multitasking, as it were: students acquire skills of organization, they think about their own learning, and they design outcomes for future learning.

Of course, there are many tools that can support this learning process and help students think in ways that create knowledge and design their own learning environments. Design thinking is one way to approach the task, either formally or informally. In any case, the tools can stand on their own or be a part of the broader picture of design.
Dialogue—a process based on more than talking and listening—is the key to greater understanding of others’ perspectives and mutual learning.

Opening the Flood Gates of Curiosity

How Dialogue Can Increase the Flow of Relational Space

Mary Grace Neville

Dialogue, different from conversation, asks people to engage in deep listening and awareness that allow for creations of thoughts and experiences not yet imagined. Adopting a dialogic stance shifts interpersonal dynamics from transactional to collaborative, especially when conducting business or creating learning environments. A dialogic stance also establishes space for cultural communication differences to exist, while decreasing the likelihood of misunderstandings. As individuals create and utilize relational space in open and curious ways, the potential for innovation increases. This article, therefore, seeks to orient readers to the concept of holding a dialogic stance and then offers specific objectives and tactics for practicing this relational orientation. By exercising dialogic behaviors, people can increase their likelihood of expanding the relational capacity within professional settings. Ultimately, these skills bring compassion and then innovation into workplaces.

Opening the Flood Gates of Curiosity

There is an old story about three blind men and an elephant: One experiences the elephant as a rope, the second experiences the elephant as a wall, and the third experiences an elephant as a large pipe. In conversation about what an elephant looks like, the men debate, exchanging reasons why they know the other men are wrong about the animal being like a rope, a wall, or a fat pipe. Of course, the first blind man has encountered the elephant’s tail, the second the elephant’s belly, and the third the elephant’s leg. When the men move beyond transactional exchanges of information and into a more reflective space of discovery, they dialogically begin to learn what else might also be true. When held simultaneously, the disparate experiences converge and the men collectively begin to imagine the elephant more fully. Each man’s perspective begins to expand the other’s way of knowing. This characterizes my experience with the concept of
“dialogue” as well as with the intention of adopting a “dialogic stance” in work.

This article first locates the concept of dialogue in different theoretical disciplines in order to suggest some common meanings. Then it offers suggestions for how people—managers, workers, teachers, and students—can practice adopting a dialogic stance, a way of being, even when tactically moving toward deadlines and stated outcomes. My hope is that we shift how we relationally conduct ourselves in business and education, proverbial blind men approaching conceptual elephants. By shifting our process, we will foster collaborative and generative potential inherent in human beings.

What Is Dialogue?

Dialogue means different things in different fields. For the purpose of this discussion, I rely on Issacs’ definition of dialogue: “a shared inquiry, a way of thinking and reflecting together.” Inquiry requires an ongoing mindset of deep listening grounded in a self-reflexive inner dialogue about one’s own beliefs, asking oneself, “What else might also be true?” In this way, inquiry requires “learning to shift your attitudes about relationships with others, so that we gradually give up the effort to make them understand us, and come to a greater understanding of ourselves and each other.” Notice that this intentionality toward learning and understanding differs significantly from debate, which is the art of persuasion, and which in popular culture often implies mere argumentation. In fact, American media so emphasizes reductionist debate and argumentation through sound bites, that role models for alternative forms of interaction pale by comparison.

Landscape of Possibilities

Dialogue in the Social Realm

In literary circles, the term “salon” characterizes a community of artisans who choose to convene for discussion; in modern culture book clubs serve this purpose. Such discussions aim to foster free expression and catalyze creative differences of perspective. These conversations typically cross ideological and disciplinary divides and serve a social as well as communal purpose of allowing people to come together to exchange ideas, develop new insights, and debate possibilities. Salon participants’ curiosity, deep listening, and shared content-interest characterize an attitude that contributes to being in a “dialogic stance.”

Dialogue for Social Healing

A South African activist differentiated dialogue from conversation when she told me about her work with the post-apartheid Truth and Reconciliation Commission (TRC). The TRC brought together groups from oppressed neighborhoods and members of the police and secret intelligence services, the people who had been the oppressors during apartheid. To one group, participating in a violent protest made someone a “freedom fighter”; to the other group, the same action made the participant a “terrorist.” Even Nelson Mandela, celebrated as a leader of peace and freedom, was on the U.S. terrorist watch list until 2008. A debate seeking to argue the validity of one classification or another could quickly deteriorate into violence. As disparate groups come together to listen to each other’s experiences and to witness the authenticity of the people engaged in the activities, space opens for both realities to be true simultaneously, even if they seem contradictory.

Dialogue as Education

Beyond obvious uses for dialogue like the skills training offered in conflict resolution programs, dialogue advocates recommend it as a form of experiential learning. Neville weaves together dialogue

www.asq.org/pub/jqp | 25
and seminar strategies with Kolb’s experiential learning theory⁴ as an approach to expanding students’ cognitive complexity, their mental ability to think critically about their own belief systems. The three blind men arguing about the elephant each held an underlying assumption that their personal encounter comprised the total and fixed possibility of what an elephant entailed. Through dialogue as an experiential learning tool (contrasted with a physical learning tool like touching a different part of the elephant) the blind men formed a richer picture. They learned other truths.

**Existentialism and Dialogic Encounter**

Philosopher Martin Buber proposes an existential perspective on dialogic encounter in *I and Thou*⁵ describing a state of deeply interconnected reverence that an enlightened person can hold. He suggests our ordinary experiences distinguish self and other (e.g., not self) by knowing self and objectifying other, an “I-It” relationship. He contrasts this with a state of reverence for all, self as simultaneously unique and an integral part of the total whole; Buber labels this “I-Thou.” Buber reveres “I-Thou” experiences, but does not suggest that such experiences can or should be the way in which people always engage the world. His assumption is that each person is simultaneously a distinct being and an integrated part of a larger whole. This interconnectedness forms a fundamental assumption for creating a dialogic stance with the world. Even though we are all individuals, we also each belong to a shared something that is greater than our individual selves.

**Dialogue in Gestalt Therapy Theory**

Gestalt theory builds on Buber’s philosophy of interdependencies by leveraging the existential self as intrinsically in relationship with others.⁶ Dialogue is co-created and built on a phenomenological assumption of interdependence. Yontef explains, “Dialogue is not you plus I, but rather emergent from the interaction.”⁷ Partlett describes, “When two people converse or engage with one another in some way, something comes into existence which is a product of neither of them exclusively. What happens between them is a function of both together.”⁸ In both cases, dialogue is co-created and built from interdependent rather than individualistic relationships.

Contrasting dialogue with debate, Wheeler explains that the objective of dialogue is to find or cultivate shared content-interest: “Dialogue is a particular kind of conversation focused not on your positions, our behaviors only, but on why those positions, those behaviors make sense to us.”⁹ Though caution must be used extrapolating therapeutic theory to build applications for work settings,¹⁰ implications include the power of curiosity, discovery through deep listening, interdependence, and a genuine intention of finding shared content-interest in our professional as well as our personal lives.

**Dialogue in Learning Organizations**

By assuming organizations are living systems,¹¹ Senge and his colleagues build on Chris Argyris’ notion of “double loop learning,” which goes beyond how to fix a problem into how to adapt continuously to ever-changing circumstances.¹² Dialogue “is not something you do to another person. It is something you do with people.”¹³ Learning organization literature emphasizes self-awareness as a core technique for fostering dialogue. Furthermore, self-awareness enhances creativity, innovation, and human potential in both classrooms and boardrooms.¹⁴, ¹⁵, ¹⁶ Organizational consultants trained in disciplines such as human resources, industrial psychology, and organizational behavior will likely approach dialogue from these perspectives.

**Integrating the Possibilities**

Across disciplines, dialogue suggests an imaginative and generative dimension in human capacity. Together, these perspectives on dialogue give rise to the possibility that someone can
embody a dialogic stance when approaching life from an ongoing place of curiosity, openly seeking to learn other truths and actively noticing themes and implications for what is “here and now” as well as for what might be emerging. Interestingly though, corporate and educational environments often orient around a deference to hierarchy (either formal or political hierarchies), thereby reducing the risk of failure, which is merely a label we tend to affix to any unexpected outcome. By sacrificing our own human presence, we move closer to the Buber construction of transactional existence, what he calls “I-It” where one person is dominant over the other, either perceiving himself more important than others or blaming others to make himself appear flawless. If corporate executives were to stay in a “here and now” space, then dominating someone over a decision from yesterday or shaming someone out of experimenting tomorrow would be unnecessary; neither blaming nor shaming stay with the “here and now.” The objective is to honor each other and each others’ ideas as having intrinsic value.

Corporations hire consultants who traditionally adopt a “doctor-patient” approach by objectively diagnosing human systems as problems and recommending fixes. As an alternative, Schein introduces “process consultation.”17 In this case, consultant and client build on each other’s expertise to co-create solutions the client imagines. Bergman and Sams18 popularized the approach for academics describing a “flipped classroom,” where teachers move lecturing and dictation of content out of the classroom such that students prepare that content in advance, and then the teacher has space to facilitate collaborative exploration of the content during the face-to-face classroom time traditionally used to “deliver” content. One premise, as with process consulting, is that the student has intrinsic value to contribute as a knowledge creator—in this case, the student brings curiosity from which education can grow.

Interesting possibilities emerge when experimenting with an “I-Thou” stance in our predominantly “I-It” worlds, but doing so requires enormous presence, willingness to accept “other” as deserving deep regard, and curiosity about ideas and possibilities in our rapidly changing world. Opening these flood gates to imagination takes mindful practice and enormous courage. Increasing the flow of innovation can be worth the effort, however.

Summary

Practice opening the flood gates of your curiosity by experimenting with new behaviors. See the online bonus article, “Creating Practicality From Dialogue Theory,” to learn eight ways to train your mind and body for new habits. Share these ideas with someone you trust, and then join together to practice. Try one new “behavior” each week, with each other and more widely with others. You do not need to tell anyone else what you are doing! You will experience new possibilities opening as you watch how others change in how they relate to you. Your shift will increase the flow of relational space.

More Online

To learn how to apply these possibilities, see “Creating Practicality From Dialogue Theory” at http://www.asq.org/pub/jqp/.

References


(Continued on p. 31)


Mary Grace Neville

Mary Grace Neville teaches, studies, and coaches the human dimensions of business strategy in society, especially toward fostering business behaviors, and relationships that create world benefit. She is the author of several journal articles and book chapters. Contact her at Marygrace.neville@gmail.com.
Creating Practicality From Dialogue Theory

Mary Grace Neville

Behavioral implications for business and education flow directly from the mosaic of perspectives explored in “Opening the Flood Gates of Curiosity.” Behavioral implications for business and education flow directly from the mosaic of perspectives. In common among the perspectives are people choosing to:

- Engage each other with an attitude of curiosity to what else might also be true beyond what is already known or believed.
- Allocate energy to listening actively to the other’s ideas or experience.
- Continuously find shared content interests.

Senge said, “Dialogue creates conditions in which people experience the primacy of the whole.”¹ The organizational system, however, would need to value the whole; more often, organizations build incentive systems rewarding the individual.² We need a set of intentional behaviors to inform practitioners interested in shifting organizational systems toward valuing the whole, in other words, adopting a dialogic stance.

Behaviors to Try (or Easier Said Than Done)

I have actively watched for people practicing a dialogic stance in their workplaces and particularly noticed eight behaviors. My teachers and coaches have since amplified these, so I include their tips as I outline the intention and assumptions associated with each behavior. Before doing so though, I must acknowledge the irony of my own attempt at making this rather transactional list or behavioral prescription for what I am simultaneously arguing can be an organic stance that nurtures humanness. Perhaps this irony is itself an essential component of the first behavior: both/and thinking.

Behavior 1: Simultaneity: Both/And
Hold Space for Multiple Perspectives of Reality to Exist at the Same Time

A dialogic stance relies on people behaving as if multiple plausible possibilities exist. A white South African friend engaged in active support of black South Africans during apartheid. The police called her a terrorist; the resistance movement called her a freedom fighter. In reconciliation, she and the police officer who kept her family’s file had to accept the multiple realities, not just of her own dual identity, but also the police officer’s dual persona as “an abuser” and as a “nationalist.” “Dialogue is a conversation with a center, not sides. It is a way of taking the energy of our differences and channeling it toward something that has a greater common sense, and is thereby a means for accessing the intelligence and coordinated power of groups of people.”³ Behaviorally, a dialogic stance requires exertion of intentional will to be present, fully as who you are, what you know, and what you want; while simultaneously being curious and receptive. Capturing the tension of a fully human experience requires both “will” of directed action and “grace” of emergent possibilities.⁴

Tip from my teachers. Watch out for but and try inserting and; explore until you see how both might possibly be true and necessary at the same time.

Behavior 2: Presence
Stay Conscious of Your Emotions and Sensations as You Think

Show up in the here and now, aware of your thoughts, emotions, sensory experience, and the meanings you are making of whatever emerges. A corporate executive once told me during a new-hire orientation that she had not hired “brains on a stick,” in fact, she had hired us expecting that we would “show up” as whole people. She did not mean that my home problems should come with me to the office, however she did expect what gestaltists call “presence”: She expected me to be physically, mentally, and spiritually present to what was happening in me and in my work at any given time. This requires self-awareness. I need to be present to myself in order to create space to be present with another. Awareness allows me to bracket my internal fears or preoccupations by mindfully knowing they exist and choosing to set them aside, neither denying nor indulging. Presence asks me to negotiate relational space while remaining autonomous. Yontef calls
presence, “putting oneself as fully as possible into the experience of the other without judging, analyzing, or interpreting while simultaneously retaining a sense of one’s separate, autonomous presence.”

Ironically, autonomy enables healthy dialogic relationality. Staying present means that I can simultaneously honor my whole self, you as an autonomous and whole person, and also our mutual interest or task. I do not judge my experience to be the only reality, however. It means “neither being nice nor being brutally honest. It means meeting and holding your ground ... it means bringing oneself to the boundary with the other person but not marching through the boundary or controlling the other person ...”

Presence does not imply telling others all of your inner feelings or fears. It implies owning those within you and acting responsibly in relationships with others. I call that, “showing up.” Sociologist Erving Goffman wrote about our presentation of self in everyday life (1959) in a book by the same name. He names multiple stages on which we do our performance of self, differing in levels of disclosure between the dressing room, back stage, and front-stage performances. Presence does not imply that I invite everyone into my metaphoric dressing room. (Being dialogic in the workplace is not the same as being in therapy, though students and clients new to the stance often nervously joke that they feel like they are the same.) Presence asks me to stay aware of my private space (my intrapsychic and my physical/sensory realities that exist regardless of whether or not my audiences notice). Presence does not mean that I give up my privacy; but it does require that I access and use all of my full wisdom system—brain, being, and body—to bring dimensionality into my public presentation of self. Otherwise, I merely revert to a transactional stance as I perform a well-rehearsed professional role that I mechanize for use in “public spaces.” While that transactional performance can be useful sometimes, knowing that another possibility (presence) exists expands my choices.

Tip from my teachers. Wiggle your toes frequently throughout the day. Take three slow deep breaths during any activity. Stop when tired to physically rehydrate your mind, just for a minute.

Behavior 3: Curiosity
Get Interested in the Expertise and Wisdom Inherent in the Other

A favorite manager of mine would manage by saying to his subordinates, “manage me.” He fully respected his expertise at the macro-level understanding of our project, including how our project fit within the larger organizational structure and strategy; and he stayed curious about our micro-level project progress and problems, including deadlines, specification changes, and organizational politics. He then acted on what the project team needed, wanted, or knew. Similarly, as a teacher, I can stay curious about how students are making meaning of what I say as I try to teach them specific theories and concepts. For example, I recently divided students into two groups for an activity telling them we would soon come together to share best practices between groups. My intention with that particular class activity was for students to experiment with ways they lead each other. There was no right or best answer; it was simply an opportunity for them to experiment with multiple styles. After about 10 minutes, one group asked if they could “sabotage” the other! I realized that they thought they were competing against each other. They assumed two groups are always separate and always competing. To them, the instruction that they would eventually “share best practices” meant that one group was going to have a better “best practice” than the other. After my moment of disbelief, I began to laugh. I had forgotten to stay curious about their experience as college students. Some 19-year-olds are better learners than others, but they are all far more expert than I am at being 21st century college students; after all, I have not been a college student in more than 30 years. The more attentive my students and I are to staying curious about each other, the better we become at co-creating instructions that enhance their learning experiences.

Curiosity is an attitude, not just a set of questions. Curiosity requires an ongoing desire to explore and to know. Applied theologian Parker Palmer calls curiosity “honest questions.” He contrasts honest questions (genuine curiosity) with dishonest questions (advice, assertion, or accusation disguised in the form of a question) when he explains: “[Have you thought about seeing a therapist?] is not an honest, open question! A question like that serves my needs, not yours, pressing you toward my version of your problem and its solution instead of evoking your truth. … An honest question is one I can ask without possibly being able to say to myself, ‘I know the right answer to this question, and I sure hope you give it to me’—which is what I am doing.
when I ask you about seeing a therapist. A dishon- 
est question insults your soul, partly because of my 
arrogance in assuming that I know what you need 
and partly because of my fraudulence in trying to 
disguise my counsel as a query. 57

Similarly, Yontef contrasts co-creation (curiosity) 
with a “procurement” orientation (pushing) 
focused on getting compliance with instructions 
that I design in my solitary experience. 5 He argues 
that pushing the other more likely leads to relation-
ship impasses than to discovery and innovation. 
Ironically, managers and teachers commonly act 
from a procurement orientation.

**Tip from my teachers.** Pause during a conversa-
tion and say aloud, “That’s interesting; what else 
might also be true?” (This line of inquiry moves 
you beyond knowing and proving, into a place of 
imagining and innovating). Interrupt your internal 
dialogue, mental chatter, voices of judgment, and 
silently ask yourself, “What else might also be true?” 
This stance opens your listening channels and 
expands your presence. Ask honest questions, ones 
to which you have no possibility of already know-
ing the right answer.

**Behavior 4: Content and Process**

**Attend to Both What Happens (Content) 
and How It Happens (Process)**

Maintaining a dialogic stance requires ongo-
ing attention to both the process and the content 
of conversations. At work, especially in today’s 
technologically accelerated and content-centric 
communication world, process gets ignored. Basic 
communication models illustrate a message sent by 
one person and received by another, mediated by 
both the sender’s and the receiver’s mental models as 
“noise” in the transmission. 8 For example, imagine 
that someone makes a statement, and that I reply, 
“What do you mean by that?” If the person presumes 
my intention is curiosity, then she might delight in 
elaborating; if the person experiences my question as 
a challenge to his authority because he perceives me 
as antagonistic or self-serving, then he might escalate 
his felt tension into anger or defensiveness.

To further complicate the process, our mental 
models are informed by the here and now, as well 
as by what happened over there or then, and even 
by what we hope or fear might become! Perhaps our 
process attention might be technically focused (such 
as attending to how the meeting will run, whether 
or not the media player is working, if sufficient 
handouts have been copied, or whether or not the 
water glass is full before I begin) or intrapsychically 
or psycho-socially focused (such as my personal 
confidence level about presenting the content, my 
residual frustration about a meeting that occurred 
20 minutes earlier, or my fear that others will not 
pay attention). Many noncontent complexities affect 
process. Simply knowing and noticing the difference 
between content (the “what”) and the process (the 
“How”) creates opportunity for multiple possible 
realities to be true, and, therefore, to more effectively 
attend to what a group most needs to do.

**Tip from my teachers.** Ask two questions sepa-
rately, “What content did we talk about?” and “How 
did we go about doing what we did?” By separating 
these two, seeing content and process separately 
becomes more apparent over time. Contract with 
a group (see behavior 7 below) for norms and 
ground rules that support both working the content 
and working the process, especially with people or 
groups predisposed to focusing only on content.

**Behavior 5: Pace**

**Co-Create the Tempo of Activity, 
Energy, and Intensity (Within Self 
and in Relationship With Others)**

Individuals shape the tempo of interaction, and 
an individual’s pace or tempo can be shaped by the 
context in which the interaction occurs. Even just 
one high-intensity or fast-talking person can accel-
erate the pace of a four-person conversation beyond 
what it might be if the high-intensity person is 
absent. As pace exceeds an individual’s natural 
inclination, the individual’s tension or excitement 
increases. While this can increase productivity and 
focus, too much tension can increase defensive-
ness and resistance, and decrease the ability to 
stay present rather than withdraw. Unmonitored 
and escalating pace can shut down some people’s 
ability to dialogue, thus rendering exchanges trans-
actional. Dialogue is a dance of relationships 
and ideas. 9 The pace at which each engagement 
occur, therefore must be co-created along many 
dimensions (such as rate of speech, comfort with 
vulnerability, energetic intensity, language, or 
paradigm differences) and at the intersection of 
multiple vectors (such as the particular players in 
the room, other people in the field, timelines, the 
task at hand). Attending to pace, therefore requires 
attending simultaneously to self and others—other 
experiences, assumptions, and possibilities.
Tip from my teachers. Slow down enough to notice the beat of the drummer that others walk to, as well as listening for your own. Check in with yourself and others at regular intervals. Acknowledge and then bracket for later what distracts you from what is needed now.

**Behavior 6: Language**

**Choose Your Words to Include Multiple Points of View**

Words hold symbolic power. Power can be used to include and to exclude. Inclusion is a key element of dialogue. Inclusion occurs when participants’ voices, experiences, and identities become core to the data considered. Using and curiously exploring the labels others assign things, naming when value gets assigned, and offering alternatives, can generate vast space for discovery and innovation. Cultural anthropologists brought insights into business studies by naming the way language constructs a social and psychological place for various groups of people (remember the example of a South African known as a terrorist and a freedom fighter, and a police officer known as an abuser and a nationalist). The labels we give experiences, behaviors, and attitudes shift our own and others’ experience of what meanings get made.

Tannen popularized gender and difference in communication styles noticing relationships between how ideas get expressed, who expresses the ideas, and who gets credit for the ideas (or who gets ignored). A geo-politically benign, yet, organizationally significant example is the word “consensus.” To some people, it means a solution with which the majority agrees, and to others it means a solution with which everyone agrees. Reaching a consensus in the minds of some and not others can erode the trust in any ongoing process.

Tip from my teachers. Ask others what they mean by the words they choose. As you speak, get curious about what others think you meant by what you said. Build agreement on what important words mean to a group. Listen to the language of silence, as well as to the words.

**Behavior 7: Contracts and Containers**

**Make Your Expectations Explicit and Ask Others What They Expect**

Managing expectations (a verbal process of “contracting” with others) and “containers” of space and time heighten levels of psychological safety. With safety comes a potential for increased vulnerability, which is required for innovation and exploration.

Dialogue rests on participants’ shared belief that everyone is in conversation for a shared purpose; in fact, a shared purpose constitutes a form of psychological contracting just as legal documents create a form of business contracting. Ground rules, such as “I” statements and confidentiality, serve a similar role. Alternatively, expecting something of someone without explicitly asking if they too agree can quickly erode into misunderstanding and blame. For example, if I expect a colleague to perform certain tasks and yet never ask the colleague his level of expertise or willingness, then I have shifted into a transactional space. To remain dialogic, I would explicitly work toward the other’s success, our shared success. Process consultant Hirschorn coaches three things for effective corporate team management: “Ensure that the team understands your operating philosophy; effectively give the team feedback on its performance; and negotiate for the resources the team needs to do its work.” Because the operating context is dynamic, this form of contracting requires ongoing re-evaluation (as simple sometimes as checking in with others) to sustain participants’ presence and curiosity.

Tip from my teachers. Co-create ground rules with groups (such as using “I” statements, confidentiality, checking out assumptions), be explicit about what emerges, and post ground rules where everyone can see them during a single session and for ongoing interaction. Model for others the tenor of a container you most hope for in your group. Explicitly update (or renegotiate) agreements when exceptions occur, when the group’s membership or objective changes, or when reconvening after a hiatus.

**Behavior 8: Experimenting**

**Try New Behaviors, Explore New Possibilities, and Update Old Belief Systems**

If I am not willing to fail—to have an outcome different than I expect—then I am unwilling to co-create new possibilities in relationship with others. A dialogic stance requires experimenting. By this I don’t recommend throwing out what works, but to hold patterns and beliefs lightly such that new versions can emerge. Historians believe that Thomas Edison and his associates used more than 3,000 theories in figuring out how to create an electric light bulb. Post-It® notes were a failed
attempt at finding glue that would stick and not be easy to remove. The managerial stance required to experiment with science and technology applies to the dialogic stance needed to harness the potential of collaborative human relationships. We cannot know with certainty what meaning will unfold in a co-created dance between people who are present and curious. Unfortunately, the vulnerability required to have an experience either profoundly meaningful or significantly different from what was expected stops many people from experimenting. Many workplaces do not foster a culture where the language “different from expected” consistently replaces the word “wrong.” To be wrong in the workplace defies many of the reward systems corporations and educational institutions have firmly in place, therefore it is to be avoided at all costs. We collectively need as much attention experimenting with human relationships as we need designing and introducing new reward and incentive systems at the organizational level.

Tip from my teachers. Be clear with yourself and others what you are experimenting with and what you are curious about as you experiment. Listen within and be sure that you are comfortable (feel psychologically and physically safe) with the experiment you imagine. Then, try the new behavior with the intention of gathering new insights; the behavior need not be forever, simply for the single experiment. After experimenting, reflect and ask yourself and seek feedback from others by asking, “How was that?” At this point, you can choose to experiment further, to explore ways to integrate the new behavior into your or your group’s repertoire or to let go of that possibility and seek out new experiments. Finally, avoid judging an experience or experiment as good or bad and try labeling it as different from what I expected or simply, here is what happened.

Implications and Conclusion

I have attempted to simplify implications of behavioral theory into lived experiences to demonstrate places where abstract theory makes concrete, practical sense. I have oversimplified theory in some places to provide basic tenets to notice and try. The risk, however, is that I have made so tactical the poetic theory of human behavior that I have extinguished some of the generative life from what I intended. I encourage readers, therefore, to live fully into experimenting with the dynamic potential of human relationships.

Experimenting with a dialogic stance can increase the human component of business in society. The stance increases possibilities of mutual discovery and new, shared understandings when contrasted with transactional instruction or rudimentary conversation, which Irish poet John O’Donahue describes as “two intersecting monologues.” With dialogue, he continues, one experiences “a conversation in which you overheard yourself saying things you never heard yourself say before, in which you heard words from the other that found places in you that you never knew existed, and that continued to sing within you for days afterwards.” Gestalt psychologist Yontef echoes this vitality saying, “Dialogue is lived. Dialogue is something done rather than talked about. ‘Lived’ emphasizes the excitement and immediacy …” Live into the possibility of what might be co-created toward the objectives and intentions on your professional agenda.

Unfortunately, our measurement- and outcomes-oriented culture often gets in the way. For example, operating from a perspective of wholes rather than summative parts makes difficult our common practice of accountability—determining who is “responsible” for a student’s learning outcomes or operational successes and failures. Similarly, honoring an obstinate curmudgeon as “thou” requires letting go of naming him as an adversary; after all, if interdependence holds, then he is also me such that his anger fuels me, which, in turn, creates him!

This article attempts to create an alternative for appropriate circumstances, an alternative of discovery and deep regard, a collaborative stance in the world that I describe as dialogic. My hope is that through collaborative experimentation, we can catalyze enormous, generative human potential in our increasingly complex and now primarily global world. Rather than moving tactically through work using a sequence of monologues predesigned to get the results on your to-do list, engage people.

References


This case study from an international supplier of healthcare-related supplies demonstrates how its “Succeed” system ensures that its daily management system helps workers perform in a way that meets company goals as well as regulatory requirements.

The Collaborative Discipline of Daily Quality Compliance Management

Romain Denis

Möllycke Health Care is a multinational organization headquartered in Gothenburg, Sweden. With locations in 32 countries, it employs more than 7,400 people, and it reported annual sales of more than 1,153,000 euros in 2013. Mölnlycke’s vision statement says, “Our passion for progress will make us the most trusted healthcare brand in the world.” Mölnlycke’s wound care division provides healthcare professionals and patients with solutions that prevent, protect, and heal wounds. Products in this line include negative pressure, electro-stimulation, dermatology, and compression items as well as dressings. The surgical division offers products and services to healthcare professionals in the operating room that improve safety, efficiency, and clinical outcomes and include gloves, staff clothing, drapes, procedure trays, antiseptics, and patient warming items.

As an international company, Mölnlycke believes that it has a particular duty to respect, promote, and comply with the principles of ethical and social responsibility. Mölnlycke’s code of conduct applies to all employees as well as its suppliers. The company’s core values center on passion, learning, and integrity. It creates value for its customers as it works to deliver innovative solutions that improve lives by listening to patients and customers throughout product development; evolving existing products to meet customer needs; developing safe, cost-effective, and innovative products that are backed by good quality and supporting evidence; and identifying ways to improve lives throughout the healthcare journey.

Corporate Quality System

Möllycke’s quality vision declares, “Through excellence in regulatory, quality, and compliance, we will ensure that Mölnlycke Health Care’s brands are the most trusted in the world.” The organization adheres to many standards including...
those for medical directives (MDD 2007/47/EC), environmental management (ISO 14001), health and safety (OHSAS 18001), as well as quality management (ISO 9001, ISO 13485:2012, and CMDCAS). It also adheres to FDA requirements and more than 400 applicable local rules, regulations, and requirements.

**Succeed System**

Mölnlycke’s Succeed system facilitates a shared view among workers carrying out the daily management required to ensure the company achieves its aim of being able to work together as effectively and efficiently as possible to meet customer expectations. Daily management is a process for dynamically administering the routine work of an organization to comply with all external regulations, perform internal procedures, and achieve the requirements and expectations of customers. This system also combines a discipline of compliance to regulations for documented work procedures, continual improvement of work activities, and skills development to increase efficiency and cost-effectiveness of all processes.

To do well with daily management requires that processes are documented properly; measures are reported accurately on the status of work progress; and performance is monitored, reviewed, and reported. Reporting must be conducted with integrity to ensure that the status of performance is visibly evident to senior managers. In addition, the system needs to anticipate all needs of decision makers for information to guide overall direction.

The design principles of the Succeed system include the following:

- **Process orientation.** Process information is provided on what, how, when, and who.
- **Accountability.** The person executing the process is considered the owner and acts in a way that is compliant, effective, and efficient, and adheres to training.
- **Communication.** Appropriate tools are available along with user orientation.
- **Operating control and quality assurance.** Operating controls integrate performance measures with feedback loops in a monitoring process to execute the “check” step in the standardize-do-check-act process for executing quality assurance by comparing the regulatory requirements against the daily management system.

- **External requirements compliance.** The organization is required to meet 400 regulations.

Mölnlycke ensures it will meet required results in three primary ways. First, the daily management system must be designed so that it is able to take into account and respond to all the diverse requirements that the medical device and pharmaceutical industries require in all countries in which the company operates. Next, these requirements must be integrated and aligned in both the operational and geographic dimensions of the organization to ensure that a collaborative process of daily compliance management is first established and then maintained. Finally, maintaining currency of these comprehensive requirements and alerting workers to changes must be an automated process that is included in communications to ensure the dynamic environment of regulatory change is kept in a state of document control that makes it possible for the company to be compliant across its operations.

**Process Roles and Responsibilities**

The following three roles are defined in the system:

- The process owner provides managerial leadership to ensure that the process runs effectively and that capabilities and competence have been developed so that organizational units can concentrate efficiently on the performance of routine work.
- The process doer plans, executes, and improves business processes that deliver value to external customers, under the guidance of the process owner. The process doer also maintains the process capability and competence of the workers to deliver agreed plans of action and milestones.
- The quality assurance facilitator ensures that processes reflect best practices and are compliant with external standards (ISO 13485, 9001, 14001, MDD, 21 CFR 820, etc.), including documentation and review according to the procedures established in the Succeed system.

The scope of the current Succeed implementation is quite broad as it encompasses 1,500 procedures, work instructions, and templates; 260 documented processes (and the number is still increasing); 320 roles (which are decreasing as the system expands); 450 changes annually; and 3,500 users (which also is growing over time).

The stages of developing the Succeed system are illustrated in Figure 1. A collaborative process
was utilized for developing Succeed. Procedures have been developed into a relationship diagram and mapped into cross-functional, end-to-end processes that deliver value to the external customers as shown in Figure 2.

Furthermore, a comprehensive information technology process has been developed and implemented to support the Succeed system. It maps policy into processes, which are divided into procedures. Succeed documents the end-to-end details of the Mölnlycke daily management system. Procedures are defined in detailed work instructions, which are supported by forms and guidelines for implementation.

**Current State and Future Evolution**

Currently all functional areas have documented work processes and are supported by process teams. People are using Succeed in daily management; however, its implementation has not yet been consistently deployed.

As might be expected with a daily management system of this scope and complexity, however, there is significant variance in maturity level between the daily management processes. There is also some management uncertainty whether the Succeed system will continue to meet the evolving regulatory and compliance requirements as the organization improves its performance to the next level. Because the organization strives to enhance its quality and compliance culture by creating the right capabilities and competencies to ensure customer insight by acting collaboratively with business acumen, Mölnlycke’s has developed an improvement roadmap for its daily management system that includes three phases as follows:

**Figure 1: Stages in Development of Succeed**

![Figure 1: Stages in Development of Succeed](image)

**Figure 2: Collaborative Process for Developing Succeed**

![Figure 2: Collaborative Process for Developing Succeed](image)
• **Short term—focus.** Use the Succeed system to develop “right the first time” compliance in daily work processes. Also, clarify and align cross-functional roles and responsibilities within the Succeed framework to manage process competence and capability.

• **Medium term—simplify.** Integrate regulatory rules and requirements into Succeed and streamline their impact on process work so that robust compliance may be ensured across all requirements. Expand quality training and development to ensure the consistent compliance and proactive improvement of the daily management system.

• **Long term—extend.** Work to increase the maturity of this systemic, solution-oriented quality culture so that routine work of the organization achieves excellence—where the quality organization acts as a professional partner and customer advocate to the process owners and business leaders.

In the future, the governance structure of the Succeed system needs to be changed to support the shift in corporate governance and reporting systems. Any strategic change of the Succeed system needs to be planned so that it integrates and supports the evolution of the Mölnlycke business strategy. The system needs to become more flexible to better support changes related to process improvements and to provide more robust support for shifting regulatory requirements, increase the speed for cycles of learning to generate continual improvement, and thus increase agility in the daily management system.

*Editor’s Note:* This is the first installment of this case study, which will be continued in the October issue of *The Journal for Quality and Participation*. More detailed information on the development and operation of the system will be included in the next segment.

---

**Romain Denis**

Romain Denis is the chief quality officer for Mölnlycke Health Care. He is responsible for directing the design and development of all company-wide quality practices; creating and implementing the manufacturing site certification strategy for environmental, health, and safety; managing the compliance with medical device and pharmaceutical standards; developing relationships with notified bodies in all nations of operation; and ensuring that quality methods and information systems support the company-wide system. He is a Senior member of ASQ and can be contacted at romain.denis@molnlycke.com.
Social Responsibility and Quality Leadership Practices

Holly Duckworth

This department presents a summarized version of an article that previously was published in the Quality Management Journal (QMJ), an ASQ quarterly, peer-reviewed publication. It links the efforts of academic researchers and quality management practitioners by publishing significant research relevant to quality management practice and provides a forum for discussion of such research by academics and practitioners. This issue summarizes the article, “Embedding Social Responsibility Principles Within Quality Leadership Practices,” by Holly Duckworth, which originally appeared in the January 2015 issue of QMJ. A link to the original article is included at the end of this department so readers can dig into the details.

Premise

The process of leading cultural change for quality improvement and social responsibility are similar. Both require an understanding of the principles associated with the envisioned culture and relentless, authentic, collaborative attention and commitment to aligning organizational behavior to those principles. This article described what to do to lead these cultural shifts and how to do it.

ISO 26000 was issued in 2010 and represents the definitive guideline for understanding the principles of social responsibility with this area described as “the responsibility of an organization for the impact of its decisions and activities on society and the environment through transparent and ethical behavior.” Its seven principles (accountability, transparency, ethical behavior, respect for stakeholder interest, respect for the rule of law, respect for international norms of behavior, and respect for human rights) provide the fundamental basis for organizational decisions and behavior. Quality managers who understand these principles thoroughly are more likely to grasp how to embed social responsibility into their personal behaviors and lead their organizations through cultural transformation to a new, richer understanding of quality.

Table 1 shows how these seven principles can be applied to quality leadership.

The concept of stakeholders also is a critical consideration when embedding social responsibility into the organizational culture. Stakeholders can be broadly defined as any individuals or groups that have an interest in any decision or activity performed by the organization. They usually encompass a diverse group of constituents including customers, employees, suppliers, and local communities. On the global level, the stakeholders’ group may expand to those interested in the economy, educational institutions that interact with the organization’s local sites, and the environment.

Foundational Theory and Methods

Before a quality leader can take the helm of redirecting the organizational culture, however, an assessment of his/her leadership behavior is worthwhile. Researchers have shown that a leader’s introspection and reflection of personal behaviors can provide “behavioral insights about how they lead people, as well as clarity about what they need to do to achieve successful business outcomes.”

Effective quality leadership—particularly during times of significant change—is likely to be as much about how the leader behaves as it is about his/her activities.

Creating a cultural shift involves a process of transformation that requires leaders to make a long-term commitment to new behaviors and actions that provide a role model. Inconsistent demonstration of the expected approach can lead to cynicism and undermine engagement and adoption of the intended culture. The commitment to principles, therefore, requires appreciative inquiry by quality leaders with a keen focus on how their behaviors and actions align with expectations and will be perceived by others. When contradictions occur, the organization is quick to question whether the cultural shift really has been adopted as the new
way of life. On the other hand, when quality leaders demonstrate the integration of social responsibility in the organizational culture, an enduring change can occur with everyone engaged and aligned to the principles that have been built.

**Practical Implementation**

Quality managers generally have learned much about leading cultural change as they engage stakeholders in embracing the principles of quality improvement. These same approaches can be applied successfully to embed social responsibility principles within quality leadership practices. It is essential to keep in mind that truly involving stakeholders is a critical approach, which embraces open, collaborative, and shared power relationships between the leader and the stakeholder. Furthermore, members of the organization need to be nurtured and developed to support the change.

In this modern time, quality leaders should take an expanded view of the field, incorporating the impact of their decisions and activities into their perspectives. Aligning what they do and how they do it to the seven principles of social responsibility addressed in ISO 26000 provides a practical way to lead an organization to a more well-informed approach and a culture that takes a broader interpretation of how it fits into the current and future world.

**Table 1: Connecting Social Responsibility Principles to Quality Leadership Behavior**

<table>
<thead>
<tr>
<th>Social Responsibility Principle</th>
<th>Quality Leadership Behavior</th>
</tr>
</thead>
</table>
| **Accountability**              | *What:* Seek criticism and opposing opinions from stakeholders on decisions and activities.  
*How:* Engage in introspection on the connections between leadership behaviors and stakeholder opinion. |
| **Transparency**                | *What:* Provide honest and accurate information to stakeholders on factors, data, or outcomes related to decisions and activities.  
*How:* Build enduring and consistent stakeholder dialogue systems. |
| **Ethical behavior**            | *What:* Demonstrate honesty, equity, and integrity.  
*How:* Walk the talk. Ensure alignment between motivation and action. |
| **Respect for stakeholder interest** | *What:* Use independent parties or mediators to facilitate decision making collaboratively with stakeholders.  
*How:* Actively engage in dialogue, not monologue, with stakeholders. |
| **Respect for the rule of law** | *What:* Test your organization for compliance to all regulations and laws.  
*How:* Proactively seek opportunities for improving system robustness. |
| **Respect for international norms of behavior** | *What:* Gather detailed information on local norms and make decisions to close gaps between local and internal norms of behavior.  
*How:* Stay curious and respectful about local norms without settling for substandard treatment. |
| **Respect for human rights**    | *What:* Direct audits through the value stream (e.g., a supplier’s suppliers) to ensure compliance to human rights practices.  
*How:* Seek to integrate social responsibility activities with quality assurance systems. |

**References**


More Online
To learn more about this important research study, be sure to read the original article from the *Quality Management Journal* at asq.org/quality-management/2015/01/social-responsibility/embedding-social-responsibility-principles-within-quality-leadership-practices.html.

**Quality Management Journal**

Based on:
“*Embedding Social Responsibility Principles Within Quality Leadership Practices*”

*Volume 22, Issue 1*

---

**Holly A. Duckworth**

Holly A. Duckworth is vice president of continuous improvement for Kaiser Aluminum. She leads the Lean Six Sigma, reliability and maintenance, sustainability, and training and development groups for the corporation. She has also held various positions for TRW Automotive and GE – Aviation in continuous improvement, quality management, and operations management. She is an ASQ Certified Six Sigma Black Belt (CSSBB) and Manager of Quality/Organizational Excellence (CMQ/OE). Duckworth is co-author of two books, My Six Sigma Workbook: A Step-By-Step Guide to Successful Six Sigma Projects and Social Responsibility: Failure Mode Effects and Analysis. Since 2011, she has led ASQ’s Socially Responsible Organization (TheSRO). She can be reached by email at duckworthha@gmail.com.
Light bulbs—they’re a key supply in every modern household, office, or other location. From the time of Thomas Edison until the Energy Independence and Security Act became law in 2012, most Americans relied on incandescent bulbs for standard light fixtures, and the other types of light bulbs were used for special situations. Now, all that has changed because incandescent light bulbs were determined to have a negative impact on the environment.

How exactly do light bulbs affect the environment? There are three primary ways—the materials used to make them, the manufacturing process, and the energy they consume when they are used. These first two areas are important, but they fall outside the considerations of the average user. Suffice it to say that some of their materials are in short supply, some of their designs produce problematic byproducts, and some of their manufacturing processes produce types of waste with long-term ramifications.

The bigger opportunity for the typical user, however, is energy consumption. As different types of light bulbs are evaluated for potential use, two metrics become important to consider—lumens and wattage. Lumens measure the amount of light emitted from the bulb, and wattage measures the amount of energy that the bulb uses. Higher lumens are good for brightness but bad for wattage. Furthermore, the bulb’s expected life is also an important factor. Table 1 was compiled from a cross-section of light bulb information websites and compares four common light bulbs for an equivalent wattage level.

<table>
<thead>
<tr>
<th>Type of Light Bulb</th>
<th>Wattage</th>
<th>Lumens</th>
<th>Average Expected Life</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incandescent</td>
<td>100</td>
<td>1,600</td>
<td>1,000 hours</td>
</tr>
<tr>
<td>Compact Fluorescent (CFL)</td>
<td>23</td>
<td>1,650</td>
<td>10,000 hours</td>
</tr>
<tr>
<td>Light-Emitting Diode (LED)</td>
<td>20</td>
<td>1,600</td>
<td>20,000 hours</td>
</tr>
<tr>
<td>Halogen</td>
<td>72</td>
<td>1,490</td>
<td>1,000 hours</td>
</tr>
</tbody>
</table>

How then do you know which bulb to purchase? In addition to the factors shown in the chart, cost, shapes, and other usage-related areas warrant attention. Under the new law, light bulbs now are required to include labeling with “Lighting Facts” details that are similar to the information provided for food products. This can help with decision making, and so can experience.
Knowledge Management Is Fun

Arun Hariharan

I magine that you are a fitness-conscious person. One of your priorities in life is to be fit and maintain good health. Over time, you have acquired a fair knowledge of the common health-related measurements such as blood sugar levels, blood pressure (BP), body mass index, and so forth. Going back to your college days, you have had a small group of friends who share your passion for fitness and are reasonably knowledgeable on health. You call yourselves the Fitness Freaks. Everyone in your group maintains regular records showing personal health measurement trends over time. Occasionally, you also compare blood sugar or BP readings with your friends. You keep track of what specific health habits (such as a particular diet or exercise routine) give you benefit. Others in your group do the same.

During your college years, each person in your group had a collection of articles and newspaper clippings on various health tips. Once, you attended a yoga training program that you loved, and you received a small book on yoga practices as part of the program.

One day, you came up with a suggestion. Why not pool everyone’s articles and other useful material into a common library that could be used by each person in the group? Great idea, say your friends.

After completing college, each of you takes a different job. A couple of your friends move to other cities. Is your Fitness Freaks club going to break up? One friend has an idea. Why not form an online health group? This way, your group can continue to interact and share information with each other using technology even if some members move elsewhere. The group agrees that this is a wonderful idea. Soon you and your friends form an online group and create the Fitness Freaks knowledge portal. The portal has a personal space for each individual where you can store electronic copies of your own health and medical records. It also has a common area for the group where members can share health tips, knowledge or experiences, and external articles. The common area can be accessed by the whole group. You can also post questions, which can be answered by any of your group members.

After a couple of months, you realize that some of the information that you seek is not available in the form of an article or other documented material; knowledge management (KM) experts use the term explicit knowledge to mean documented or documentable knowledge. Not all knowledge can be documented. Some questions require specialized answers from an expert; KM...
experts call this tacit knowledge. You then invite a couple of medical doctor friends to join your online group. Now you have subject-matter experts in your little online community, and you can ask questions to the experts.

The experts start posting relevant research, articles, and cases from outside your small group. This is external knowledge that is relevant to your area of interest.

Some months later, one of your friends informs you that he will no longer be able to participate in the online group. Over these months, this individual has contributed considerably to the portal’s contents. As a result, a good part of his individual knowledge remains even after he leaves the group. In other words, some of his individual knowledge was converted into group knowledge, which can be reused by the group.

Over time, you and your friends contribute a considerable amount of your own knowledge and experience to the group’s knowledge base (in this story, your knowledge base was initially your small library of paper articles, which subsequently evolved into your online portal). Also, considerable external knowledge is contributed by members of the group in the form of articles and case studies. In addition to all this documented or explicit knowledge, the group members themselves (your community), with their tacit knowledge, are an important part of your group’s common knowledge base.

One day, you think of purchasing a treadmill for your exercise routine. By now, it has become second nature with you and other members of your group to first go to the Fitness Freaks knowledge portal to find information about anything related to fitness. A quick search on the portal shows that a couple of group members have recently posted information about treadmills. One of them has actually purchased a treadmill after researching different models, their features, and where you can get the best prices. She has posted all this information on the portal. In minutes, you have the information that you need to make your decision. The next day you purchase a treadmill with all the features you wanted and at a significantly better price than what you might otherwise have paid, thanks to the application of knowledge residing in your group’s knowledge repository. Without this knowledge repository, you might have spent considerably more time unnecessarily reinventing the knowledge that your friend has already gathered. This gets you thinking about the results of your group’s little KM initiative—faster and better results with no reinvention.

When you purchase your treadmill, you learn that the manufacturer has recently introduced a small, inexpensive gadget that can be attached to the treadmill to enable certain additional health-related measurements. This gadget was not available two months ago when your friend purchased her treadmill. When you post this information back into the portal, the same friend decides to purchase this gadget for her treadmill, too. Thus, in the process of applying or using the knowledge that already existed in the knowledge base, you have also added or created some new knowledge that your group did not have. This happens frequently in KM—in the process of using (or copying) existing knowledge, new knowledge is created.

A few months later, you realize that some of the early content in your knowledge portal is now outdated and should be deleted, permitting your knowledge base to remain current and relevant. For

---

**The Strategic Knowledge Management Handbook**

**Driving Business Results by Making Tacit Knowledge Explicit**

**Author:** Arun Hariharan

**Abstract:** This book is written for senior management and knowledge management professionals who need to understand how to use knowledge management as a strategic tool to achieve business objectives and how to implement a knowledge management system that provides real business results. The contents of the book are relevant to any business—whether manufacturing, service, not-for-profit, government, and other types of organizations.

**Publisher:** ASQ Quality Press

**ISBN:** 978-0-87389-914-7

**Format/Length:** Hardcover/150 pages

**Price:** $35.00

---
example, the information on treadmill prices was relevant when it was posted six months ago, but is probably outdated now. You and the rest of your group agree that one person in the group will, by rotation, take the responsibility to delete outdated content at the end of every three months. If this person is not sure whether some content is outdated, he or she can consult other group members before actually deleting it.

One day, a group member has a suggestion. He points out that until now, knowledge sharing on the group’s portal has been purely voluntary and sometimes important information is lost. For example, suppose a member of the group, by following a certain fitness regimen, has done a great job of maintaining her health measurements consistently month after month but neglects to post the information. The information about her regimen is clearly of great value to other group members, but what if she forgets to post the information? What if she postpones this task because she finds it cumbersome? That’s when we come up with another idea. Why not have a structured process for knowledge sharing, so that the sharing of relevant knowledge, including best practices, becomes almost mandatory and is not left to chance or choice?

Then another question arises. What is relevant knowledge? Given that the objective of our group is to promote good health, any knowledge that is useful for promoting good health becomes relevant knowledge for this group.

The next question is this. What qualifies as a best practice? Again, we decide to keep it simple. A practice or regimen that enables someone to maintain healthy measurements (that is, in the normal range) consistently for a period of six months is a potential best practice. A group member who ranks best in the group on a particular measurement consistently for six months potentially has some best practices. The group agrees that it would be mandatory, not optional, for concerned members to post their best practice to benefit the rest of the group. To avoid making this cumbersome, we introduce a simple one-page standard format in which to document a best practice.

Next, we realize that introducing a process for knowledge sharing is only one side of the coin. Once a group member shares a best practice, should its application or use by other members be left to chance or choice? As all group members are genuinely interested in the goal of good health, we agree among ourselves that replication or use of knowledge that is shared must also be a mandatory process, and not left to chance. We introduce a brief document format with which other members can document and share with the rest of the group how they used someone’s best practice and with what results.

After a year of following the standardized processes for knowledge sharing and replication, the group finds that overall health results for every member have improved significantly and consistently.

We will come back to the Fitness Freaks story in a bit.

**Data, Information, Knowledge, Wisdom**

Much has been written in the KM and information management literature about the data-information-knowledge-wisdom (DIKW) hierarchy or continuum (see Figure 1). The primary purpose of this book is to help readers implement or apply KM to achieve business objectives. As I learned from my years of experience helping companies to do this, a detailed discussion of DIKW theory is not required for this purpose. Nevertheless, a very brief description is provided for readers who might be interested.

**Data**

Data represents a fact or statement of event without relation to other things (for example, in the Fitness Freaks story, body weight reading [by itself] is a piece of data).

**Figure 1: Data, Information, Knowledge, and Wisdom—Application and Results**

**Information**

When data are arranged or presented in a way that helps you to understand some kind of relationship, possibly a cause and effect, they become information.

Fitness Freaks example: Suppose you measure your body weight every Sunday. If you list the last 10 Sunday weight readings and record next to them the number of days you exercised during the previous week, this becomes information. The numbers, arranged in this manner, may help you to find some kind of relationship between the two sets of data. You may find a cause and effect between the number of days you exercised and your body weight. This is information.

**Knowledge**

Knowledge represents a pattern that connects information and generally provides a higher level of predictability as to what will happen next. When you advance from information to knowledge, you are able to make a higher level of generalized inference.

Fitness Freaks example: Suppose, after studying several weeks of information, you find a pattern in the relationship between your weight each Sunday and the number of days you exercised the previous week. Based on this pattern, you conclude that your weight is likely to be at the desired level when you exercise regularly. This is knowledge.

**Wisdom**

Wisdom represents a deeper understanding of the knowledge and the fundamental principles behind the knowledge. Wisdom is relatively more universal or general than knowledge.

Fitness Freaks example: A clear understanding of the principles of fitness, how and why exercise results in overall good health (of which keeping body weight under control is a component), the consequences of lack of exercise on health—this is wisdom. This wisdom must result in a firm resolve or decision to exercise regularly.

**Business Example**

Now let us look at a business example. Your company received 100 customer complaints in the last week of a month. This is data. When you look at the complaints data week after week, there seems to be a relationship between the week of the month and the number of complaints. There are more complaints in the last week of the month than in other weeks. This is information.

You study the weekly complaints data for the last six months and find a definite pattern. Every month, the number of complaints peaks in the last week. This is knowledge.

You investigate this phenomenon and find that it has to do with the monthly sales targets given to salespeople and the way salespeople are incentivized. Traditionally, the behavior of many salespeople in your company (and perhaps in many other companies) is to take it relatively easy in the beginning of the month. As the month nears its end, they realize that they are far from achieving their sales target. In the pressure to achieve their target (remuneration depends on it), some of them try to sell more by making false promises to customers. This results in the higher number of complaints in the last week of every month. You realize that this has to do with the principles of how salespeople are incentivized. This is wisdom. Based on this wisdom, you resolve or decide to change the incentive system to correct the behavior of the salespeople. In the future, salespeople will earn some extra incentive if they sell more or less uniformly during the month. This will motivate salespeople to sell throughout the month, and prevent the pressure from building up toward the end of the month.

**Application and Results**

The story doesn't end there. It cannot end there. After all, what's the use of all the data, information, knowledge, and wisdom if you don't use or apply them and get results?

In the Fitness Freaks example, we see that it is only when you actually carry out your decision to exercise regularly that you will attain your objective of maintaining good health.

In the business example, it is only when you actually implement the new incentive system for salespeople that you will be able to level the sales activity during the month and attain your business objective of reducing customer complaints that arise due to end-of-month selling pressure.

This book will talk again and again about the application and results of KM with numerous real examples.

Because the primary purpose of this book is to inspire the application of KM to achieve business results, it is enough have a broad understanding of the DIKW concept. It is not necessary to split hairs as to whether something is information, knowledge, or wisdom. What is important is that application achieves results, and this book is designed to help with that. In the rest of this book, the words information and knowledge are used...
interchangeably. The focus of this book will be to help you ensure that knowledge (whether you prefer to call it information or knowledge or wisdom) that is relevant to your business, from any source internal or external to your organization, is available at the right place at the right time to enable the right person(s) in your company to make the right decisions (you may choose to call your decisions data-based or well-informed or knowledgeable or wise) and implement them so that you achieve your strategic business objectives.

In other words, for the purpose of achieving results in your business by using KM, it is OK if you are not sure whether something should be called information or knowledge or wisdom; it is not OK if application/implementation and results are absent.

I hope you enjoyed the Fitness Freaks story. If you have read this story, you have understood the essence of the science of KM. Almost everything you need to know to implement KM in your organization is contained in this story. This story and KM are relevant to you, whatever the nature of your business—manufacturing, services, healthcare, education, or government.

KM works essentially in the same way in business or other organizations as it did in the Fitness Freaks example. Naturally, there might be additional challenges in KM implementation having to do with the size of your business. Whether your organization consists of dozens, hundreds, or thousands of employees and whether these people are located across cities or countries, the fundamentals of KM remain the same. Obviously, there are likely to be additional details we need to know and challenges we need to be prepared for while implementing KM in a business. We will look at these in the remaining chapters. The book contains plenty of business examples from first-hand experience. We will also occasionally go back to the Fitness Freaks story to see how certain concepts introduced in subsequent chapters would apply to them.

Arun Hariharan

Arun Hariharan, the author of the 360-degree Knowledge Management model, is a knowledge management (KM) and business excellence practitioner with nearly three decades of international professional experience. He has helped several large companies in diverse industries achieve substantial and sustained business results and competitive edge through KM and/or excellence strategy and implementation. Hariharan is the founder and CEO of The CPI Coach, a company that provides partnership, consulting, and training in business excellence and related areas. Contact him at thecpicoach@gmail.com.
Thinking About ASQ

Patricia C. La Londe

When I hear the name ASQ, I think of being better, doing more, serving as a leader of quality, and leaving the world a better place. I am honored and humbled to be your chair-elect for this year and to serve as ASQ chair in 2016. As a member of ASQ for more than 30 years, I have been well served as my needs changed over time. Looking back as I started my career, I sought technical and leadership skills. Through ASQ I was always able to find the training, tools, and the network that I needed. This ranged from the basics while entering the quality field; to gaining meaningful certifications in quality engineering, management, and auditing; to networking with quality professionals in my section, divisions, and through enterprise membership executive roundtables.

The heart and soul of our Society is our engaged members. To all of you who devote your time, expertise, and leadership, I thank you. I believe we can, and do, make the world a better place. ASQ’s approximately 75,000 individual and organizational members are building the future of quality using quality tools and methods. As stewards of the global quality movement, ASQ is advancing ideas, tools, techniques, and systems that will help the world meet tomorrow’s critical challenges.

ASQ members save money, reduce waste, improve efficiencies, champion effective teamwork and project management, and promote critical thinking and innovation in companies, hospitals, schools, agencies, and communities around the world. This makes you, and every other ASQ member around the world, leaders in the quality initiative.

ASQ’s community can, and will, inspire a new generation of global business leaders to become passionate builders of a culture of quality across their enterprises by embracing the notion that quality in the 21st century is not just an advantage—it’s an imperative!

As stewards and leaders, I see our role, along with our board of directors and the ASQ CEO and his staff, is to continue to nurture this evolution; enable and ensure our growth, vitality, and relevance; and enhance the impact of what we do. As the poet Maya Angelou said, “When we know better we do better.”

As I review our strategies and business plan, I am reminded of a question asked by Dr. John W. Hanes, president of Effectiveness Dimensions International. He wondered, “Why do some organizations thrive in recessionary times and emerge even stronger while others die?” The answer, Hanes said, “Is that winning organizations have legions of change-focused leaders at every level, not just one lone visionary at the top. They follow a proven formula for exercising dynamic leadership to both survive uncertain times and flourish for years to come.”

As I work closely with the ASQ board and leadership team, I feel certain that we have change-focused leaders steering the Society down the right road. Here are my priorities for 2016:

- Investing in and improving member value is still and will continue to be ASQ's top priority. One example is a renewed focus on the Quality Body of Knowledge (QBoK). A new QBoK executive advisory board has been created to lead the QBoK strategy that will encompass comprehensive knowledge delivery through tailored customer experience to drive member satisfaction and engagement, customer acquisition, and ASQ’s sustainability.

- Leveraging technology through a multi-year technology strategy that was developed and is being implemented to advance our Society and build for the future to realize our vision of being the global voice of quality. Our members and customers will reap the benefits of a more stable and flexible IT infrastructure that offers more choices, greater conveniences, and easier search and navigation capabilities.

- Accelerating ASQ’s journey to truly being global. ASQ is aligned and united to grow and advance the global quality community. ASQ is the global knowledge network that links the
best ideas, tools, and experts because ASQ has the reputation and reach to bring together the diverse quality champions who are transforming the world.

• Supporting the use of quality to make the world a better place by launching the Global State of Quality research, deploying the Future of Quality Study research; expanding the Team Excellence program, and more.

You can expect my commitment and full engagement to help ensure that ASQ remains vital—through the leadership, governance, and guidance of the board; by listening to your voices and your wisdom; and through close collaboration and teamwork with our CEO and the ASQ staff around the world. I want to thank the current chair, past chairs, and our leaders and contributors. My challenge for all of us is to fully engage, provide innovative solutions, and serve as the leaders of change. We need and have legions to ensure we achieve the ASQ mission and fulfill the brand promise of being the global voice of quality.

Editor’s Note: This presentation was made at the World Conference for Quality and Improvement on May 3, 2015, in Nashville, TN, at the ASQ annual meeting.

Patricia C. La Londe, principle of P. La Londe Consulting, is an executive in supply chain management with expertise leading teams in all aspects of procurement and supply chain including supplier quality, global sourcing, mergers, acquisitions, divestitures, and integrations across diverse businesses. An ASQ Fellow, she is chair-elect of the ASQ board of directors and co-chair of Global Advisory Committee and Strategic Planning Committee. La Londe is an ASQ Certified Manager of Quality/Organizational Excellence (CMQ/OE), Quality Engineer (CQE), and Quality Auditor (CQA). Contact her via email at plalonde90@gmail.com.
Organization Diagnosis, Design, and Transformation: Seventh Edition

Author: John Vinyard

Abstract: This book addresses the most detailed level of the Baldrige Criteria for Performance Excellence (CPE)—the 42 Areas to Address. It is organized into five parts and is designed to help leaders and organization architects understand the fundamentals or key design concepts of performance excellence; their organization’s unique context as it relates to the design of organization systems and a comprehensive scorecard; organization systems including strategic leadership, execution excellence and organizational learning, and support systems; the organization scorecard including comparisons to other world-class organizations; and the path to performance excellence including organization diagnosis, design, and transformation. Each section begins with a foundation, an introduction to the basics of the particular area to address. This is a common-sense description of what the CPE questions in the particular area to address are asking. Following the foundation, a mix of business, healthcare, and education examples are included to help “bring alive” the key elements of the particular areas to address. These tangible, real-world examples are included courtesy of the Baldrige Award recipients and other world-class organizations.

Publisher: ASQ Quality Press
ISBN: 978-0-87389-911-6
Format/Length: Softcover/662 pages
Price: $92.00

Advance Quality Auditing: An Auditor’s Review of Risk Management, Lean Improvement, and Data Analysis

Author: Lance B. Coleman

Abstract: This book has essential information that will help guide an organization’s efforts to glean more value from their audit processes. It helps grow the audit function beyond verification audits by providing insights for using the audit function to improve organizations using lean principles. It also discusses how the audit function can contribute and be integrated into an ongoing risk management program.

Publisher: ASQ Quality Press
ISBN: 978-0-87389-913-0
Format/Length: Hardcover/125 pages
Price: $37.00
**Innovation Never Stops: Innovation Generation—the Culture, Process, and Strategy**

*Author:* Peter Merrill

*Abstract:* Innovation is experiencing the “growing up” phases that quality went through 20 years ago, although, not surprisingly, it is growing up much faster. The myth that quality was solely the function of a specific department was left behind with the acceptance of quality management. Innovation is leaving behind the myth that innovation is solely the job of research and development and is now discussed in terms of innovation management. This second edition of the book includes new material on the forces of change as the prime driver of innovation, discussion of the relationship between innovation and quality, explanation of the need for innovation management and a management system approach to innovation, additional material on creativity and idea creation, or “ideation,” and new material on management of risk as it is tied to the metrics of innovation.

*Publisher:* ASQ Quality Press
*ISBN:* 978-0-87389-912-3
*Format/Length:* Hardcover/170 pages
*Price:* $50.00

**Executing Lean Improvements: A Practical Guide With Real-World Healthcare Case Studies**

*Author:* Dennis Delisle

*Abstract:* In this book there is a structured approach to executing lean improvements along with relevant real-world case studies; examples of tools and templates with downloadable files; hints, tips, and lessons learned; and chapter challenges aimed at giving the reader assignments to apply key concepts and tools in the work setting. The primary audience for this book is individuals responsible for improvement in healthcare settings, such as lean practitioners, Six Sigma belts, quality improvement specialists, and project managers. Other health professionals also will benefit from the practical application and guidance.

*Publisher:* ASQ Quality Press
*ISBN:* 978-0-87389-909-3
*Format/Length:* Hardcover/276 pages
*Price:* $75.00
**Chief Customer Officer 2.0: How to Build Your Customer-Driven Growth Engine**

**Author:** Jeanne Bliss

**Abstract:** This book offers a proven framework that has launched and advanced the customer experience transformation in businesses around the world. The five-competency model for coaching C-suite and chief customer officers is described—manage and honor customers as assets; align around experience; build a customer listening path; strive for proactive experience, reliability, and innovation; and promote one company accountability, leadership, and decision making. The book includes more than 40 accounts of actions by customer leadership executives around the world and offers the framework as a way to build a customer-driven growth engine.

**Publisher:** Wiley

**ISBN:** 1119047609

**Format/Length:** Hardcover/256 pages

**Price:** $28.00

---

**Anticipate: The Art of Leading by Looking Ahead**

**Author:** Rob-Jan de Jong

**Abstract:** Business schools, leadership gurus, and strategy guides agree—leaders must have a vision, but the sad truth is that most don’t or at least not one that compels, inspires, and energizes people. How can something so essential be practiced so little in real life? This book explains that leaders must sharpen two key skills to develop vision. The first involves the ability to see things early—spotting the first hints of change on the horizon. The second is the power to connect the dots by turning those clues into a gripping story about the future of the organization and industry. Packed with stories and practices, this book provides proven techniques for looking ahead and exploring many plausible futures, including the author’s trademarked Future Priming™ process, which helps distinguish signal from noise.

**Publisher:** AMACOM

**ISBN:** 978-0-8144-4907-3

**Format/Length:** Hardcover/288 pages

**Price:** $27.95
Use one of the many networking platforms ASQ has to connect with other quality professionals. When you network with others, you help grow the quality community, and in turn, increase the impact quality has worldwide. Connect through:

- Your local section or division
- ASQ conferences
- ASQ Communities
- Webinars, forums, and blogs
- Social media

Visit asq.org/communities to learn more on how you can meet professionals in your industry.

NOT A MEMBER? Visit asq.org/membership to find out how to join.
Early-bird pricing available until March 25, 2016!

REGISTER TODAY!