

## Case Studies of OD interventions by Plummer & Associates

Here are example consulting engagements where we helped organizations succeed through various people focused interventions. As our clients don't want their specific "pains" identified, the organization names are not listed.

### OD Case 1 - 2-Hr Team Building Session for Exec Team Retreat

The CEO of a 300-person company was planning a 2-day retreat with his executive team. His tentative agenda was filled with critical business issues, including acquisition plans for the coming year. He also wanted to focus attention on how they worked together as an executive team. He wanted his team "tuned up" for the coming challenges and had 2 hours he could give for "team building". He thought the team should discuss process and he also wanted some feedback on how they viewed his as a leader.

We proposed a short survey to gather team member's perspectives on their effectiveness and on the CEO's leadership. We also included three questions about the business acquisition process. Survey results were sent to the team for review 2 days prior to the retreat.

We started the team building session with a trust-building exercise. Then we spent an hour reviewing and discussing the survey results.

- What did it say about our team?
- What insights do the results provide about how we can improve our effectiveness?
- How does the CEO's view of our team differ from the members' views of the team?
- How do we collectively view our effectiveness on handling acquisitions?
- What are our priorities for improving our acquisition process?

To wrap up the session, we took the team to the next room where we had set up a fun, fast-paced exercise called [VisionWeb](#). The exercise consists of a "web" of ropes and pulleys that participants use to achieve a team goal of stacking cylinders.

The simulation consists of two parts. In the first part, only the leader is aware of the goal and the participants cannot see what is going on with other team members. It only takes a few minutes to realize that the team is going nowhere fast. In part 2, the participants can see that the goal is to stack cylinders. They then fairly quickly "work the web" in concert with other members to achieve the goal. After the exercise, we did a quick debrief of how the two approaches were different and what could be learned from the exercise to help their team.

In closing, we brainstormed action items to improve team effectiveness and asked for individual commitments for one or two actions they would take to help the team get even better.

We received excellent feedback. They felt the advance survey helped them get to their team issues quickly and facilitated a more in depth and honest discussion of the team in the meeting. They also enjoyed the ropes exercise and felt it underscored how important it is for everyone in the organization to understand goals and work interdependently to achieve them.

## **OD Case 2 - Intervention to Improve Inter-Group Communications**

(This case also illustrates the use of short, issue-focused surveys.)

An HR Director asked us to help resolve conflict between the HR and Finance departments. While acknowledging that personality differences existed between the two Dept. Heads, the conflict also involved several team members in each department. The groups needed to interact on a variety of projects and poor communication was impacting morale and productivity.

We interviewed each Director to understand their perspective about the conflict. We also interviewed a couple of key team members from each department. To gather further advance information for the meeting, we developed a short online survey for the two groups. Each person was asked to assess their group's performance and the performance of the other group on various communication topics. They were also asked to describe how they viewed themselves, how they viewed the other group, and how they felt the other group viewed them.

The data from the mini survey was summarized and sent to members of both teams a couple of days prior to the meeting. All department members also completed an on line Myers Briggs assessment.

The full day workshop began with a two-hour, Myers-Briggs communications workshop with all Department members. This helped people understand that all the preferences are needed to obtain best results and to appreciate the different preferences of their peers and leaders. We gave them information about how to communicate effectively with different types. The rest of the morning was spent reviewing the results of the survey and breaking into small, action planning teams with HR and Finance represented on each team. The groups were asked to look at the data from each group's perspective and then develop some specific plans to improve communications. The morning session was closed out by reassembling the entire group and asking each person to share something they personally planned to do to help improve future communications.

In the afternoon, our facilitator met for a coaching session with just the two Directors. The survey data was reviewed with them and the morning workshop debriefed. The Directors were also asked to talk honestly about what their personal contributions to the conflict issues were and to brainstorm ways that they and the two groups could begin to improve their inter-group communications.

The feedback on the workshop from the team members and the Directors was very positive. They felt that the honest discussions about communication issues would help them improve. We checked back with the Directors two months after the workshop and they indicated that inter-group communications had improved dramatically. They were pleased that each group's perceptions of the other group were now more positive as were their own understanding of each other.

### **OD Case 3 - Comprehensive Employee Survey Process**

We won a bid on a comprehensive employee survey process for a 250-person town government. The RFP included designing and conducting an extensive employee survey to measure the “organizational health” of the town government and identify areas for improvement. In addition to the employee survey, the RFP also called for:

- advance focus groups with a cross section of employees to help identify critical employee issues to include in the survey,
- follow-up, small-group action planning sessions with all employees
- 360-feedback process with the Town’s senior executive team, including follow-up coaching sessions with each executive to review their 360 results and the employee survey results for their department.

The advance focus groups with a cross section of 30 employees provided input for the survey design and created positive press for this first time employee survey. Our client, the HR Director, and we were pleased with the 80% participation in the survey.

We presented the survey results and our recommendations to the exec team and also shared plans and asked for feedback about the follow-up action planning sessions. These sessions yielded numerous additional improvement ideas. Employees appreciated that the survey results were being taken seriously by the exec team believed that improvements would be made.

The concurrent 360 process also worked well. The employee satisfaction data was a great complement to the 360 feedback the execs received from their subordinates, peers, and internal and external customers. In their coaching sessions, we helped the execs review both sets of data and build action plans for improvement.

This organization was performing well before the survey. The survey results helped them identify plans to further improve the organization. Several months later, the client was awarded national recognition for quality processes. The HR Director shared that she felt the survey process and 360 coaching was an important factor in their recognition.

#### **OD Case 4 - Conducting focus groups to obtain input for a new VP**

This large transportation organization transferred in a new vice president for a large call center. He wanted to gain an impartial overview of what employees liked and didn't like about the current work and environment. We conducted 20 focus groups of call center, billing, accounting, and technology employees working on three shifts at two sites. Input was gathered on topics such as: the job, the work environment, leadership, and what's working well and what could be improved. We prepared a written report of themes and recommendations and presented these findings at an off site retreat with Customer Service leaders. Through these efforts, the employees embraced the leadership of their new VP and he successfully used the plan as a roadmap during his time in this role. The Technology Department liked the approach and result and also asked for focus groups, a written report and presentation regarding how they could better support the Customer Service Dept.

#### **OD Case 5 - Coaching for a new Leader**

An organization made an external hire for Director of a 120 person department. The Director quickly made changes in how the work was performed resulting in serious employee dissatisfaction. Internal customers also complained about the changes. We were brought in to coach the Director. After some initial sessions, we then interviewed each direct report. We designed a workshop to address issues and suggestions for improving communication with this team. The Myers Briggs Type Inventory was taken by the team and results were shared in the workshop. There were many "ah ha" moments where the Director and dept. managers gained insight about each others preferences in making decisions, sharing info in staff meetings, etc. The Director modified his approach and the team members began to trust and have confidence in his willingness to listen and flex his approach.